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The Sociology of Elites: a European stocktaking and call for collaboration

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Introduction

A little more than a decade ago, Mike Savage and Karel Williams (2008) lamented that elites were ‘remembered by capitalism, forgotten by social science’ and issued a manifesto for the study of elites to be revitalized to address major shifts in capitalist societies in which wealthy elites were driving forward major projects of economic, social, and political change and in which they were major beneficiaries.

As elites became even more prominent in the aftermath of ‘austerity’ politics introduced in many parts of the globe after the 2008 economic crash, this clarion call attracted considerable attention. Indeed, by 2020, the situation is very different. In the intervening twelve years there has been an explosion of research on elites across the social sciences, and notably in economics and sociology (see the overview in Khan 2012b, Korsnes et al 2017, Savage 2021). In the context of this renewal of the sociology of elites, this working paper is a stocktaking exercise which provides a convenient glossary of mainly European based sociological research projects which is designed to be a resource for further research.

This exercise is not just descriptive. It is also intended to assist in rectifying a significant disciplinary imbalance which has emerged. Since 2000 economists have opened up a new conceptual arena around studying the small percentiles of the highest earners or most wealthy groups (e.g. Piketty 2014, 2020, Alvaredo et al 2018). Sociologists by contrast prefer a more multidimensional perspective which draws attention to different facets of elite position – such as political influence, corporate power, social and cultural capital and so forth. This working paper recognizes that the research of sociologists is currently less co-ordinated than that of the economists. Led by Atkinson, Piketty, Saez, Alvaredo and Zucman, and associated with a wider infrastructure based at the Paris School of Economics, economists have elaborated a core methodology, concentrating on the changing ratios of income and wealth shares, which allows close integration of theory and methods and the development of an impressive database, the World Inequality Database, which systematizes comparable findings from across the world. There is a core commitment to use taxation data as the empirical bedrock of the analysis, supplemented by other data sources as appropriate. This is part of a wider project of developing new kinds of ‘distributional national accounts’ which can shift dominant economic frameworks in which national accounts concentrate on measures of GDP/GNP and expand these to include measures of inequality. A number of publications have achieved major academic and ‘real world’ impact and allowed this research to obtain high prominence, indeed possibly to be the single most influential stream of contemporary social science (e.g. Piketty 2014, 2020, Alvaredo et al 2018, Atkinson 2015).

The research of sociologists by contrast, is probably more original and extensive, in terms of the range of approaches developed and data sources consulted, and more theoretically inventive in terms of its capacity to push forward new analyses of elite formation. It is

certainly more plural in its methodology, with major contributions from both qualitative and quantitative researchers, and a considerable battery of quantitative methods being applied. However, its academic and ‘real world’ impact is far less developed. This is largely due to the fact that this sociological research is not strongly co-ordinated, is largely conducted by separate research teams with only informal (if any) collaboration. Most importantly of all, this research is largely confined within specific national domains, so lacking the prospects for consistent international comparative research of the sort that economists have so effectively managed. If anything, a previous generation of pathbreaking sociological research on elites which focused on interlocking elite positions (especially corporate directors), and championed positional approaches for identifying the elite(s) and which offered empirical tools for elaborating themes in classic elite theory (e.g. C Wright Mills 1959, Stokman et al 1985) or on pluralist approaches (e.g. Dahl 1958, Keller 1991), has actually lost its primacy, so leading to even less coherence than was the case from the 1960s to 1980s.

The aim of this working paper is therefore to provide a stocktaking of major sociological interventions in elite research over the past decade, as a means of providing a comprehensive account of what has been achieved so far by numerous research teams (see also Heilbron 2017). This stocktaking is designed to clear a platform for the more important work of developing a methodology and perspective for comparative sociological analysis of elite formation going forward. It is hoped therefore that this working paper will be a valuable resource for anyone wishing to find a systematic bibliography to recent sociological research on elites.

We acknowledge at the start that this is not a comprehensive account of all sociological research on elites. It is already clear, given the dramatic expansion of the field over the past decade that it would be a major undertaking to provide this, and this lies beyond our scope here. In particular, we do not discuss important and growing US based sociological studies of elites (see the overview in Khan 2012b, Keister 2014). Whereas the recent revival of US based sociology of elites has largely adopted qualitative and ethnographic methods (see e.g. the brilliant ethnographies of Khan 2012a, Rivera 2016 and Mears 2020), the European tradition is more methodologically heterodox and includes a commitment to innovative quantitative methods, as discussed below. This makes cross-fertilisation with the research of economists more possible. This working paper only represents research arising out discussions amongst a group of European researchers in 2020 who have expressed a wish to develop further collaboration through the auspices of the LSE’s International Inequalities Institute. It therefore largely reports the contributions of a group of scholars who are already loosely affiliated through overlapping research networks as explained below. The aim is to bring out the contributions of these already-networked sociologists in order to facilitate further collaboration with a greater range of sociologists, both inside and outside Europe, going forward, who can have a better sense of the range of work which this group has already developed. We also welcome future collaboration

with scholars who have not been part of this network to date and invite them to make contact with us.

The overview for each of the projects are written by the corresponding group members.

Institutional bases of European sociological research on elites

The projects reported here are not a comprehensive inventory even of European sociological studies of elites. They are derived from collaborative platforms supported by three major research initiatives and networks:

The Network for the Studies of Cultural Distinctions and Social Differentiation (SCUD). Aalborg University, <https://www.scud.aau.dk/>

SCUD, directed by Annick Prieur provided a platform for established and early career researchers from (mainly) northern Europe to collaborate to develop Bourdieu inspired research across different European nations. The SCUD network was a fusion of two existing and partly overlapping networks. The first was a French-Norwegian network centred on the Bourdieu's sociological school and applications of multiple correspondence analysis in studies of cultural consumptions and social differentiation. The second network was established in 2004 with a meeting at the University of Uppsala. The meeting was financed by professor Gronow's grant from the Swedish Riksbankens Jubileumsfond and gathered 16 researchers from Sweden, Finland, Norway, Denmark and Great Britain with a common interest in studies of cultural consumptions and social differences. From 2006-2014 SCUD became the single most important vehicle for European collaboration in research on social and cultural inequalities, SCUD had major networking meetings in Aalborg, Milton Keynes, Bergen, Manchester, York, Brussels and Copenhagen. Its use of MCA methods, and its interest in consumption were an important impetus to elite research.

The Centre for Research on Socio-Cultural Change (CRESC), University of Manchester/ Open University, 2004-2015. <https://www.cresc.ac.uk/>

CRESC, directed by Mike Savage from 2004 to 2009, was committed to developing methodological expertise in the analysis of socio-cultural relations. One of its major contributions was to elaborate Pierre Bourdieu's methods for the analysis of cultural fields, which inter alia led to Bennett et al's *Culture, Class, Distinction* (2009), the most rigorous study of cultural engagement and exclusion ever carried out in the UK. From 2005 it began to collaborate with colleagues in SCUD to develop multiple correspondence methods that Bourdieu had used but which had remained rare in anglophone social science. This led to greater collaboration with numerous European partners, notably John Hjelldrekk (Bergen), Brigitte Le Roux and Henri Rouanet (Paris V), Frederic Lebaron (now ENS – Paris Saclay), Felix Bühlmann (now Lausanne), and Laurie Hanquinet (now ULB). Although MCA was originally used to study whole populations drawing on national surveys, their adaptability for analyzing elites had been pioneered by Hjelldrekk and Lebaron which

proved to be influential models for further research. CRESC researchers were amongst the first to revive elite studies in the UK, using these Bourdieu inflected methods (e.g. Bennett and Warde 2008, Savage and Williams 2008).

International Inequalities Institute, LSE, 2015> <https://www.lse.ac.uk/International-Inequalities>

This institute, co-directed by Mike Savage from 2015-2020, became a major platform for the interdisciplinary and multi-dimensional study of inequality. Of particular note was the potential it provided for collaboration between economists, sociologists, and other social scientists. It played a significant role in encouraging wider interdisciplinary engagement with Piketty's influential research, and more specifically developed a research theme from 2017 on 'wealth, elites and tax justice' which permitted engagement with leading social scientists from LSE Departments and beyond, so expanding the network further. This platform has been especially important for developing collaboration with scholars who work on the global south, who are interdisciplinary in their framing, and who are specifically concerned with investigating the transnationalism of elites as a specific focus.

Common sociological themes

The projects which emerged out of the three platforms mentioned above share a number of intellectual co-ordinates. Indeed, although only loosely co-ordinated hitherto, they have staked out some key common denominators and an approach which can be a platform for a more integrated platform for the sociology of elites. Without wishing to impart any kind of orthodoxy – for there is none – a number of convergent issues can be identified. Brief references to specific researchers are made in this discussion, with fuller details including bibliographic references available in the glossary itself.

Firstly, when analyzing elites, multidimensional approaches are generally favored over unidimensional approaches. Different types of elites – economic elites, political elites or cultural elites – as well as different power resources or forms of capital are identified and the study of the relationships and hierarchies between these elites and resources is an important element of this approach. This is in part due to the common inspiration found in the works of the late Pierre Bourdieu (e.g. Bourdieu 1996) and in C Wright Mills' classic study (Mills 1956). This allows the analysis of elites to represent a more sophisticated perspective than the economists focus on income and wealth shares, or indeed unitary measures of occupational class as frequently deployed by sociologists such as in the Goldthorpe tradition.

Secondly, several of the research groups have championed the use of innovative data sources which permit quantification, so offering a model for how sociology itself can renew its empirical tool kit. The tools used include dedicated elite surveys (e.g. Hjellbrekke & al. 2007), large-scale online surveys (e.g. Savage & al. 2013), public register data (e.g. Toft 2018), new and important prosopographic data sets, also made possible because of new data technology, scraping methods and digitalized archives (e.g. Ellersgaard, Lunding &

Larsen 2019, Denord, F., Ymonet, P.L. and Thine, S., 2018, Friedman & Reeves, 2020). New possibilities have also resulted in several important historical studies, of which the works of Bühlmann and his collaborators and Friedman and his collaborators typical examples. However, this research is not only quantitative, and a significant number of this research network have also used innovative qualitative methods, including showing how interview data (e.g. Hecht 2017, Schimpfössl 2018, Surak 2020) can be used, especially in probing underdeveloped research areas such as around gender inequality and 'elite women' (e.g. Glucksberg 2018, Schimpfössel 2018, Ginalski 2016, Hjellbrekke & Korsnes 2016).

Thirdly, "relational" methods, developed in order to examine relations between individuals, but at various analytical levels, are important statistical tools. Social network analysis, or SNA has been an important resource (e.g. Ellersgaard & Larsen 2015), is widely used when analyzing *manifest* relations between elite agents. When uncovering *latent* relations and structures, there is a strong methodological affinity for multiple correspondence analysis, or MCA (Le Roux & Rouanet 2010, Hjellbrekke 2018) when analyzing structural oppositions between and formations of elite groups. These relational methods have been used in innovative ways to examine arenas of elite consecration, e.g. the Davos-meeting (Denord, F, et al. forthcoming) or prestigious dinners (Hjellbrekke & Korsnes, 2017). This permits a focus on the arenas where the elites' symbolic capital assets are both confirmed and accumulated, and thus also arenas for elite legitimation.

Fourth, increasing attention has been given to *elite careers*, and how these may vary both within and between elite groups. This has led to strong and joint interest in sequence analysis drawing on Andrew Abbott's inspiring use of this method (Abbott 1995, Cornwell 2015); (e.g. Toft 2018).

In all these ways, the sociology of elites can be seen as pushing the wider renewal of sociology itself. This field offers a theoretically sophisticated and methodologically rigorous way of grasping elites as a social process, embedded in multiple and multidimensional capital hierarchies moves beyond conceiving them as exclusively on predefined statistical categories, e.g. the 1% or the 0.1%, when identifying the elite. Instead of applying a strict, economic definition of this group, one seeks also to analyze the heterogeneity and the composition of elite formations, and how this might be changing over time. With this "field of power"-approach, the ambition is also to analyze forms of elite power more broadly.

We therefore hope this glossary will be a valuable resource. However, this glossary also indicates that up till now, the teams listed below have largely developed their own protocols in specific national contexts within Europe. And even though the transnationalization of elites has been given increasing attention the last decade or so (see for instance Vauchez 2012, Georgakis & Rowell 2013, Bühlmann, F., David, T and Mach, A. 2013; Bühlmann, F., Davoine, E. and Ravasi, C. 2018; Hartmann 2017), a systematic research

program is still called for. We are therefore seeking to develop more co-ordinated research tools which can be used to build more systematic comparative research. We would be keen to hear from other researchers who might be interested in developing this project in the future.

Mike Savage and Johs Hjellbrekke, January 2021

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The Glossary of Contributions by Different Teams

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Data sources:

The Danish elite network database; Kraks Blå Bog (digital data from the Danish version of *Who's Who* 1910-2020); Danish corporate register; prosopographical databases on a) circa 400 individuals in the core of Danish elite networks (The Danish power elite) in 2012 and 2017, b) 100 Danish top CEO's in 2008 and c) 1700 individuals from the Danish power study in 1999.

Key methodological and analytical approach:

The main methodological approach has been a combination of descriptive, or relational, quantitative methods such as social network analysis, multiple correspondence analysis and sequence analysis. However, this has also been combined with qualitative interviews with 37 key players in the elite. The analytical approach aims at combining bourdieusian and millsian perspectives on elites.

List of publications:

Ellersgaard, C.H. and Larsen, A.G. 2015. "The Danish Elite Network." *Connections*, 35, 1, pp. 64–68.

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Research highlights:

Being an egalitarian redistributive welfare state has led to a depiction of Danish elites as being virtually non-existent or at least a much less important social group than in other societies. However, contemporary research into top positions and networks suggest that while elites in Denmark most certainly work in different ways than in other societies, they are no less distinct or influential. The research has explored these particularities in two ways. First, by being methodologically innovative to identify power elites and second by focusing on the particular approaches to capital accumulation used to enter the upper echelons of society.

While other research has tended to depict Denmark as something of a pluralist haven, identifying elites in a highly negotiated political economy suggested looking at which groups interlock across key sectors. By employing the power elite framework of C. Wright Mills (1956), it was argued that those "sitting on the same terrace" constituted the key individuals and organisations in society. By employing large scale network data on all potentially powerful affiliations (Ellersgaard and Larsen 2015), the power elite was identified as the around 400 individuals in the core of this vast elite network (Larsen and Ellersgaard 2017). The power elite was dominated by executives and chairmen in big business (for further elaboration on the network of large corporations, see Larsen and Ellersgaard 2018b, 2019) - and business associations - employing more than half of core

members, supplemented by leaders in unions, politics, state administration and science and education, each composing between 12 and 8t per cent of the core (Larsen and Ellersgaard 2018a).

The presence of unions in particular and also of business association executives - and the non-existence of leaders from for instance military, culture, media and clergy - highlights a particular elite constellation, in particular as leaders of the same unions - with close cross-class alliance to industry - remains the most central in the elite network even as their leader change (Ibsen et al. 2021). It is thus not a power vested in the individual, but rather the organization, that enables some to act as key brokers. However, while the Danish power elite is undoubtedly different from what we could expect to find elsewhere, it is still a homogeneous group both interlocked in the networks described above, spatially clustered in the affluent Copenhagen areas and similar when it comes to age, gender, ethnic background, education and perhaps most surprisingly social background, with almost two-thirds originating from the upper- or upper middle classes.

The particularities of the Danish elite are not least seen in the way members of this elite constellation accumulate capital in a particular institutional setting. When one compares a traditional positional elite, top 100 CEO's to those in UK, France and Germany, the social background is similar, while the importance of educational credentials - or the school based mode of reproduction (Bourdieu 1996) - is very different (Ellersgaard, Larsen, and Munk 2013). While elite schools (or doctorates in the case of Germany) play a key role, Danish executives are selected based on long-lasting occupational affiliation or direct family ties to their corporation.

Similarly, a small set of organizations dominate the organizational landscape of careers of the around 400 individuals in the power elite group, further strengthening the cohesion of this group through ties to the same career hubs (Ellersgaard et al. 2019). Capital accumulation is thus tied closely to the types of organizations active in the elite network, leading cultural capital to play a less pronounced role on the Danish field of power, which is instead dominated oppositions between a) inheritors and outsiders and b) public versus private forms of capital, or between established and delegated (Lunding, Ellersgaard, and Larsen 2020b).

Progress in the research on the importance of long-lasting relations is being made (for an early attempt, see Henriksen et al. 2018) and insights from qualitative interviews are still being incorporated. However, by combining prosopographical data with descriptive, relation methods network analysis, multiple correspondence analysis and sequence analysis (Lunding, Ellersgaard, and Larsen 2020a), the key institutional features of Danish elites have been mapped.

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Laurens, Sylvain, EHESS research director, Centre Maurice Halbwachs: <https://www.cmh.ens.fr/Laurens-Sylvain>

Thine, Sylvain, researcher affiliated to the CESSP, <http://cse.ehess.fr/index.php?1366>

Data sources:

The main source is an original database (n circa 7000, in one Excel spreadsheet) that combines personal information collected in the *Who's Who in France* (2009), through semi-automated media-coverage (coding in R), web-scraped lists of affiliation (boards of directors, social clubs, foundations, front organisations, political parties, think tanks, unions).

Moreover, for his book *Lobbyists and Bureaucrats in Brussels* (2018) Laurens had developed a database on the lobbying activities of large enterprises in Europe. The database PRESSURE was initiated in 2009 and is now hosted in Paris by the EHESS-ENS CMH Centre. Managed by Sylvain Laurens, it contains 6500 interest groups (both national and European) and 2500 top level lobbyists operating in Brussels. The data was first culled from official directories published by the European Commission and contains data from 1960 to 2004. These data are rare because the 1960, 1973 and 1980 directories were published in French and sometimes translated into Dutch, leading many scholars to ignore these data. We scanned these directories and digitized them using optical character recognition (OCR). Our database, built with Microsoft Access, allows queries about both organisations and staff.

Part of an on-going project on the influence of Canadian and French corporate leaders upon the Comprehensive Economic and Trade Agreement (funded by the Social Sciences and Humanities Research Council), professor Saïdatou Dicko (UQAM, ESG, Canada) and Lagneau-Ymonet are recoding the CVs of more than 2000 board-members of large Canadian and French companies.

Key methodological and analytical approach:

After having completed their doctoral dissertations on French neo-liberals (Denord), high-civil servant in charge of the migration policies (Laurens), the ascendancy management

consulting (Thine) and the history of the Paris stock-brokers (Lagneau-Ymonet), the team members have joined their forces to develop quantitative and ethnographic studies of the French and European power structures. To do so, they mainly on the Bourdieusian “field theory” and Mills’ concept of “power elite”. To operationalize this combination of Marxist-Weberian syntheses, the team members resort to Geometric Data Analysis and Social Network Analysis (SNA). By putting the emphasis on objective relations rather than actual ties (the alpha and omega for most SNA users), GDA is well-suited to investigate the dynamics of power structures, despite the disintegration of traditional modes of coordination among fractions of dominant groups (such as interlocking directorates, *cf.* Chu and Davis, 2016).

List of selected publications in English:

- Denord, F., Palme, M. and Réau, B. 2020. *Researching Elites and Power. Theory, Methods, Analyses*. Springer. <https://www.springer.com/gp/book/9783030451745>
- Denord, F. 2009. “French Neoliberalism and Its Divisions: From the Colloque Walter Lippmann to the Fifth Republic,” in Mirowski, P. and Plewhe, D. (eds.) *The Road from Mont Pèlerin*. Harvard University Press. <https://uberty.org/wp-content/uploads/2015/10/mt-pelerin.pdf>
- Denord, F., Lagneau-Ymonet, P. and Thine, S. 2018. “*Primus inter pares?* The French field of power and its power elite.” *Socio-Economic Review*, 16, 2. <https://academic.oup.com/ser/article-abstract/16/2/277/4978525>
- Lagneau-Ymonet, P. and Riva, A. 2018. “Trading forward: the Paris Bourse in the nineteenth century.” *Business History*, 60, 2. <https://www.tandfonline.com/doi/full/10.1080/00076791.2017.1316487>
- Laurens, S. 2018. *Lobbyists and Bureaucrats in Brussels*. Routledge. <https://www.routledge.com/Lobbyists-and-Bureaucrats-in-Brussels-Capitalisms-Brokers/Laurens/p/book/9780367886240>

Research highlights:

Theoretical contribution: from the sociology elites to sociology of power

By combining Bourdieu and Mills, the team members, among other scholars (i.a Bühlmann, Ellersgaard, Grau-larsen, Lunding) tend to shift the analysis from individual qualities to the structure of power. The approach, which is relational rather than essentialist, guards researchers against elitism. Because the perspective is structural rather than interactionist, it also helps to explain individual and collective strategies that are not always reducible to rational actions.

Methodological contribution: public information is available for harvesting

At odds with conspiracy theory and exotic fascination for the “high and mighty”, the team members adopted a positional and a reputational approach to collect publicly available

information on individuals who occupy positions of power as well as information on the organizations they run or represent. The three main principles for data collection are:

Searching for the legitimate self-representations of powerful agents;

Controlling for selection bias through general statistics;

Complementing this information with other publicly-available sources (institutional sites; media coverage; wiki biographies).

Empirical contribution: beyond integration into the capitalist order and class seniority

Insights into the national structures of power can help researchers move beyond debates on meritocracy and on leadership to the analysis of the power struggles between institutions that rank and legitimize individuals. Social movements, legal actions and political decisions can force them to be more open, but this does not necessarily affect the power structure in itself. For instance, in France, like in other capitalist societies, such as Denmark, Norway and Switzerland, that social scientists usually categorize in other varieties of capitalism, power over the means of production splits national fields of power. Their internal hierarchy is also affected by class seniority, which provides incumbents with prestige and facilitates their social strategies to maintain or acquire their preeminent positions.

Avenues for further research

Do we observe similar forms of differentiation and principles of hierarchization in other capitalist societies, for instance Great Britain, Germany and the United States? If so, what differentiates capitalist societies, beyond integration into the capitalist order and class seniority (“*what do observe on the third axis of the specific multiple correspondence analyses we run?*” so to speak)?

What are the dynamics of those national power structures? Do we observe everywhere the adoption by holders of economic capital of the indirect school-mediated mode of reproduction? To which extent “populism” is a reaction to the arrogance of the meritocrats?

How do we articulate the analysis of national power structures and the study of transnational bureaucracies such as the European institutions as well as international organisations like the IMF, the OECD, the World Bank or international bodies such as the Financial Stability Board?

Germany, comparative country perspective

Country: Germany, Comparative Country Perspective

List of researchers & university affiliations: Nora Waitkus, London School of Economics

Website(s): <https://www.lse.ac.uk/International-Inequalities/People/Nora-Waitkus/Nora-Waitkus>

Data sources: German Socio-economic Panel (SOEP), Luxembourg Wealth Study (LWS), Own Media Data Collection (based on Factiva)

List of publications:

- Waitkus, N. and Groh-Samberg, O. 2018. "Beyond Meritocracy. Wealth accumulation in the German Upper Classes," in Korsnes, O., Heilbron, J., Hjellbrekke, J., Bühlmann, F. and Savage, M. (eds.) *New Directions in Elite Studies*. Routledge, pp. 198-220.
- Waitkus, N. and Groh-Samberg, O. 2019. "The Space of Economic and Cultural Capital. A Latent Class Analysis for Germany," in Blasius, J., Le Roux, B., Lebaron, F. and Schmitz, A. (eds.) *Investigations of the Social Space*. Basel, Springer, pp. 81-97.
- Pfeffer, F.T. and Waitkus, N. 2020. "The Wealth Inequality of Nations." *LWS Working Paper Series* 33.
- Pfeffer, F.T. and Waitkus, N. 2021. "Comparing Child Wealth Inequality Across Countries." *Journal of the Russel Sage Foundation*. Forthcoming.
- Waitkus, N. and Minkus, L. 2020. "Investigating the Gender Wealth Gap across Occupational Classes." *Feminist Economics*. Forthcoming.
- Waitkus, N. and Wallaschek, S. 2020. "Legitimate Wealth? How Wealthy Germans are Portrayed in the Press." *Unpublished Manuscript*.

Research highlights:

I study wealth elites from three distinct dimensions. First, following Bourdieusian perspective on class and wealth, I and my co-authors study wealth accumulation, portfolio composition among elite occupations and across the class structure (see Waitkus/Groh-Samberg 2018;2019; see also Waitkus/Minkus 2021). Arguing, that the capital portfolios – i.e., the clustering of specific portfolios of various types of economic and cultural capital – as the outcome of class-specific types of investment strategies. Specific capital portfolios are assumed to represent distinct social strategies of investing into social status: strategies to attain, reproduce, and accumulate capital portfolios. Particularly among elite classes, capital portfolio and particularly asset portfolios become very diversified, insuring elites against any kind of economic turmoil.

My second research strand is to study wealth inequality and concentration across countries focusing on the top 5% wealthy as well as the broader wealth distribution (Pfeffer/Waitkus 2020; 2021). Drawing on data from the Luxembourg Wealth Study, we find that wealth concentration is high in many countries, but particularly so in the United States. What is more, levels of wealth and income concentration do not correlate in cross-country perspective, as only the United States reports both high levels of concentration among the top 5%. By means of decomposition techniques we show that it is particularly the concentration of housing equity that explains the variation of overall levels of wealth concentration across countries, while financial assets and non-housing real assets as well as debts play – in comparative cross-country perspective – a substantially smaller role.

Third, drawing on a sample of newspaper articles between 2014 and 2018, Stefan Wallaschek and I study the framing of wealth concentration among the wealthiest German business families by the German press. We find that inequality is only an issue in less than half of all press article. What is more, business elites are oftentimes framed as entrepreneurs or smart investors, without acknowledging that most wealth was actually inherited. Although most articles refrain from morally evaluating wealth elites, if they do so, they tend to be more positive than negative and invoke patterns that frame the wealthy as hard-working taxpayers and ordinary people who are providing society with jobs and philanthropic good.

Norway**Country:** Norway**List of researchers & university affiliations:**

Prof. Magne Paalgard Flemmen, Department of Sociology and Social Geography, University of Oslo

Prof. Marianne Nordli Hansen, Department of Sociology and Social Geography, University of Oslo

Prof. Johs. Hjellbrekke, Department of Sociology, University of Bergen

Postdoc Maren Toft, Department of Sociology and Social Geography, University of Oslo

Data sources:

- Administrative registry data
- Historical census data and prosopography on academic elites
- Registry data on organizational affiliations and board memberships
- Surveys on Norwegian elites.
- Prosopographical data sources.

Key methodological and analytical approach:

- Social sequence analysis, multiple correspondence analysis, latent class analysis, loglinear and log-multiplicative models, regression techniques. Basic knowledge in social network analysis.
- Field of power/social space approaches to analyses of social inequality and power relations.
- Neo-Weberian class theory, Bourdieusian sociology and the theory of social closure.

List of publications:

Denord, F., Hjellbrekke, J., Korsnes, O., Lebaron, F. and Le Roux, B. 2011. "Social capital in the field of power: the case of Norway." *The Sociological Review*, 59, 1, pp. 86-108. <http://onlinelibrary.wiley.com/doi/10.1111/j.1467-954X.2010.01994.x/full>

Flemmen, M. 2009. "Social closure of the economic upper class." *Tidsskrift for Samfunnsforskning*, 12, 4, pp. 493.

Flemmen, M. 2012. "The Structure of the Upper Class: A Social Space Approach." *Sociology*, 46, 6.

Paalgard Flemmen, M., Toft, M., Lie Andersen, P., Hansen, M.N. and Ljunggren, J. 2017. "Forms of capital and modes of closure in upper class reproduction." *Sociology*, 51, 6.

- Hansen, M.N. 2014. "Self-made wealth or family wealth? Changes in intergenerational wealth mobility." *Social Forces*, pp. 457-481. ISSN 0037-7732. doi: [10.1093/sf/sou078](https://doi.org/10.1093/sf/sou078)
- Hansen, M.N. and Wiborg, Ø. 2019. "The Accumulation and Transfers of Wealth: Variations by Social Class." *European Sociological Review*. ISSN 0266-7215. doi: [10.1093/esr/jcz036](https://doi.org/10.1093/esr/jcz036)
- Hjellbrekke, J., Le Roux, B., Korsnes, O., Lebaron, F., Rouanet, H. and Rosenlund, L. 2007. "The Norwegian Field of Power anno 2000". *European Societies*, 9, 2, pp. 245-273. <http://www.informaworld.com/smpp/content-db=all?content=10.1080/14616690601002749>
- Hjellbrekke, J. and Korsnes, O. 2016. "Women in the Field of Power." *Sociologica. Italian Journal of Sociology Online*, 10, 2. <http://www.sociologica.mulino.it/journal/article/index/Article/Journal:ARTICLE:949/Item/Journal:ARTICLE:949>
- Hjellbrekke, J. and Korsnes, O. 2018. "A Place at What Table?" in Korsnes, O., Heilbron, J., Hjellbrekke, J., Bühlmann, F. and Savage, M. (eds.) *New Directions in Elite Studies*. Routledge, pp. 93-112.
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- Toft, M. 2018a. "Upper-Class Trajectories: Capital-Specific Pathways to Power." *Socio-Economic Review*, 16, 2, pp. 341-364.
- Toft, M. 2018b. "Enduring Contexts: Segregation by Affluence Throughout the Life Course." *The Sociological Review*, 66, 3, pp. 645-664.
- Toft, M. 2019. "Mobility Closure in the Upper Class: Assessing Time and Forms of Capital." *The British Journal of Sociology*, 70, 1, pp. 109-137.
- Toft, M. and Jarness, V. 2020. "Upper-Class Romance: Homogamy at the Apex of the Class Structure." *European Societies*. doi: [10.1080/14616696.2020.1823009](https://doi.org/10.1080/14616696.2020.1823009).

Research highlights:

Social Closure in the Upper Classes.

Flemmen (2009), shows that closure in the upper classes to some significant extent is achieved by reconversion strategies, or the investment in educational credentials, but by no means all of it. Even when controlled for education, significant 'effects' of social origin persists.

Flemmen & al. (2017) also find important differences in mobility barriers by the form of capital, i.e. capital-specific mobility barriers. The degree of closure is comparable in the cultural and economic capital fractions. Thus, closure operates through two distinct rules of closure — the education system *and* the system of private property.

Lastly, Flemmen (2012) reveals important differences *within* the economic upper class. This group is divided principally by volume of inherited capital, which corresponds to one's own education. Within the economic upper class, education functions more a resource of class reproduction than as a channel of inflow mobility. Moreover, there is a continuing relevance of a division between owners and executives/managers, identified by their source of economic capital, which is also a warning against reducing economic capital to one single phenomenon.

Recruitment to, and Reproduction of the Elites.

Hansen (2014) focus in on the top 1 percent and the top 0.1 percent of the wealth scale over a period of nearly two decades. The recruitment into the top wealth groups is extremely restricted, and most so in recent years. Having wealthy parents, and especially top wealth origins, is important for wealth attainment. The very top wealth category appears to be a rentier class, with higher incomes from capital than from earnings.

It is more common to receive transfers in the higher than in the lower social classes (Hansen & Wiborg 2019). Those originating in the economic upper class, i.e. large proprietors, owners, of single enterprises as well as investors with diversified portfolios, and top managers and directors, are especially likely to receive transfers, as well as especially large inter vivo gifts. As young adults, those with upper-class origins, and especially origins in the economic upper class, accumulate more wealth than those with origins in classes lower in the social hierarchy. In all social classes, those who have received wealth transfers accumulate most wealth. In Norway, transferring wealth appears as robust and efficient mobility or reproduction strategy.

And even though the elite professions of law and medicine have experienced growing numbers of candidates, they manage, partly due to different institutional strategies, to maintain their exclusivity. Parents' income and self-recruitment are relatively stable and important factors for the recruitment in both fields, although these trends are somewhat higher in law than in medicine. Drawing on Turner's (1960) ideal-typical concepts of contest and sponsor mobility, we pinpoint institutional differences between the types of education provided for both groups and how these have adapted to meet the expansion in candidates seeking to qualify as lawyers and doctors (Strømme & Hansen 2017).

The Field of Power.

Hjellbrekke & al.'s analysis (2007) of the Norwegian field of power uncovers a tripolar structure between an economic, a political and a cultural/educational/research pole, with a clear opposition between the inheritors and the newcomers. Within this field, social capital assets, which can act as a multiplier on the other forms of capital are distributed

unevenly. In the “core of the core”, we find a group of actors that are strongly interconnected inside what is called “the tripartite system”, which has a high level of multi-positionality and inter-sectorial connections (Denord, Hjellbrekke & al. 2011).

The structural oppositions among the women in the field of power differs from those of men in some important respects. Firstly, the opposition between inheritors and newcomers is stronger, and the importance of economic capital weaker, than in the global field. Furthermore, among the women, there is a distinct opposition between educational and political/field specific social capital. Whereas the sectorial oppositions in the global field are tripolar, the oppositions between the women are bipolar; positions in politics/NGOs are contrasted to positions in research, higher civil service and in the judicial system. And within this field, the women are divided into three subgroups; “outsiders”, “meritocrats” and “inheritors”.

Finally, even in arenas of consecration, the tripolar structure in global field is found structuring the symbolic hierarchy in the elites. At the annual dinner for The Central Bank of Norway, we find the same oppositions between the tables, as can be measured by the individuals table seating, as in the global field (Hjellbrekke & Korsnes in Korsnes & al. 2017).

Upper Class Careers, Homogamy and Urban Segregation.

Toft (2018a, 2019) shows how different class careers are embedded in family contexts and parental capitals and contexts. Biographically late arrival and unstable affiliation to the top are linked to modest class origins, while the sons and daughters of the economic fraction of the upper class are inclined to enjoy stable affiliation to dominant positions within business, and the children of the cultural fraction enjoy lasting affiliations within cultural fields. This suggests the cementation of *capital-specific upper-class class cores* within the Norwegian class structure.

Tracing neighbourhood sequences in Oslo, Toft (2018b) finds that upon leaving their parental home and the following 24 years into adulthood, a minority is living in recurrent poor and affluent areas over time. But those who live in affluent milieus are in close proximity and their local area is more isolated than the urban poor. The liberalization of housing and credit markets has enabled the privileged to engage in strategies of withdrawal that may naturalize their personal experiences with class privilege.

Finally, Toft and Jarness (2020) show that homogamy and patterns of attraction and affection within the Norwegian upper class are structured along three dimensions. i) Vertical divisions: the upper class are likely to marry among themselves; ii) Horizontal divisions: marriages are disproportionately within class fractions along economic and cultural capital, iii) divisions along trajectories: the long-range upwardly mobile are less likely to have a partner in upper-class positions.

Switzerland

Country: Switzerland

List of researchers & university affiliations:

The Swiss research on elites is very much a collective effort and has been institutionalised at the Swiss Elite Observatory at the University of Lausanne (OBELIS). The Swiss contribution to this project on “European and Transnational Elites” will be coordinated by:

- Prof. Felix Bühlmann, University of Lausanne, Institute of Social Sciences.
- Dr. Thierry Rossier, London School of Economics, Department of Sociology.

Many other researchers have been involved in the data collection for the Swiss Elite data base:

- Prof. Thomas David, University of Lausanne, Institute of Political Studies.
- Prof. André Mach, University of Lausanne, Institute of Political Studies.
- Dr. Stéphanie Ginalska, University of Lausanne, Institute of Political Studies.
- Prof. Eric Davoine, University of Fribourg, Department of Management.
- Dr. Andrea Pilotti, University of Lausanne, Institute of Political Studies.
- Dr. Pierre Eichenberger, University of Lausanne, Institute of Political Studies.
- Dr. Pedro Araujo, University of Fribourg, Department of Management.
- Dr. Pierre Benz, University of Lausanne, Institute of Political Studies.
- Dr. Roberto di Capua, University of Lausanne, Institute of Political Studies.
- Karim Lasseb, University of Lausanne, Institute of Political Studies.
- Dr. Anne-Sophie Delval, University of Neuchâtel, Institute of Sociology.

Website(s): The Swiss Elite Observatory (OBELIS): <https://www.unil.ch/obelis/en/home.html>

Data sources: Swiss Elite Database: <https://www2.unil.ch/elitessuisses/index.php?page=accueil#english>

Key methodological and analytical approach:

Our research is based on a prosopographical and historical database (the “Swiss Elite Database”). This base includes data on Swiss business elites, political elites, administrative elites and academic elites at the national (and also local) level and follows a positional approach. Data have been collected for the years: 1890, 1910, 1937, 1957, 1980, 2000, 2010, 2015 and 2020 (for a total of currently 33’369 elite individuals). Recently, a similar data collection has been undertaken for business, political, cultural and academic elites at the local level in the three largest cities (Zurich, Geneva, Basel) for the same years. More on the sample can be found on the website.

OBELIS has researched Swiss elites qualitatively, through historical document analysis, and quantitatively, through multiple correspondence analysis (analysis of the field of business, of politics and some academic disciplines), social network analysis (corporate interlocks, trans-sectoral elite networks) and sequence analysis (careers), and, more generally, descriptive statistics.

List of publications:

- Araujo, P. 2018. "Dynamics of Internationalization. A Sequential Analysis of the Careers of Swiss Banking Elites," in Korsnes, O., Heilbron, J., Hjellbrekke, J., Bühlmann, F. and Savage, M. (eds.) *New Directions in Elite Studies*. Routledge, pp. 73–89.
- Benz, P., Bühlmann, F. and Mach, A. (2020) "The Transformation of Professors' Careers: Standardization, Hybridization, and Acceleration?" *Higher Education*. <https://doi.org/10.1007/s10734-020-00590-7>
- Bühlmann, F. 2020. "How to Study Elites' "International Capital"? Some Methodological Reflections," in Denord, F., Palme, M., and Réau, B. (eds.) *Researching Elites and Power*. Cham, Springer International Publishing, pp. 241–251. https://doi.org/10.1007/978-3-030-45175-2_19
- Bühlmann, F., Beetschen, M., David, T., Ginalski, S. and Mach, A. 2017. "Elites in Switzerland: The Rise and Fall of a Model of Elite Coordination." *Tempo Social*, 29, pp. 181–199. <https://doi.org/10.11606/0103-2070.ts.2017.125960>
- Bühlmann, F., Benz, P., Mach, A. and Rossier, T. 2017. "Mapping the Power of Law Professors: The Role of Scientific and Social Capital." *Minerva*, 55, pp. 509–531. <https://doi.org/10.1007/s11024-017-9333-1>
- Bühlmann, F., David, T. and Mach, A. 2012a. "Political and Economic Elites in Switzerland: Personal Interchange, Interactional Relations and Structural Homology." *European Societies*, 14, pp. 727–754. <https://doi.org/10.1080/14616696.2012.709531>
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- Bühlmann, F., Davoine, E. and Ravasi, C. 2018. "European Top Management Careers: A Field-Analytical Approach." *European Societies*, 20, pp. 453–477. <https://doi.org/10.1080/14616696.2017.1371314>
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- of Law and Economic Sciences,” in Korsnes, O., Heilbron, J., Hjellbrekke, J., Bühlmann, F. and Savage, M. (eds.) *New Directions in Elite Studies*. Routledge, pp. 247–264.
- David, T., Ginalski, S., Mach, A. and Rebmann, F. 2009. “Networks of Coordination: Swiss Business Associations as an Intermediary between Business, Politics and Administration during the 20th Century.” *Business and Politics*, 11, pp. 1–38. <https://doi.org/10.2202/1469-3569.1269>
- David, T., Heiniger, A. and Bühlmann, F. 2016. “Geneva’s Philanthropists around 1900: A Field Made of Distinctive but Interconnected Social Groups.” *Continuity and Change*, 31, pp. 127–159. <https://doi.org/10.1017/S0268416016000114>
- David, T., Mach, A., Lüpold, M. and Schnyder, G. 2015. *De La ‘Forteresse Des Alpes’ à La Valeur Actionnariale. Histoire de La Gouvernance d’entreprise Suisse (1880-2010)*. Zurich and Geneva, Seismo.
- Davoine, E., Ginalski, S., Mach, A. and Ravasi, C. 2015. “Impacts of Globalization Processes on the Swiss National Business Elite Community: A Diachronic Analysis of Swiss Large Corporations (1980–2010),” in Morgan, G., Hirsch, P. and Quack, S. (eds.) *Research in the Sociology of Organizations*. Emerald Group Publishing Limited, pp. 131–163. <https://doi.org/10.1108/S0733-558X20150000043017>
- Davoine, E. and Ravasi, C. 2013. “The Relative Stability of National Career Patterns in European Top Management Careers in the Age of Globalisation: A Comparative Study in France/Germany/Great Britain and Switzerland.” *European Management Journal*, 31, pp. 152–163. <https://doi.org/10.1016/j.emj.2012.06.001>
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- Eichenberger, P. 2017. *Mainmise sur l’État social. Mobilisation patronale et caisses de compensation en Suisse (1908-1960)*. Éditions Alphil-Presses universitaires suisses.
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- Ginalski, S. 2013. “Can Families Resist Managerial and Financial Revolutions? Swiss Family Firms in the Twentieth Century.” *Business History*, 55, pp. 981–1000. <https://doi.org/10.1080/00076791.2012.744587>

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- Ginalski, S. 2020. "Who Runs the Firm? A Long-Term Analysis of Gender Inequality on Swiss Corporate Boards." *Enterprise & Society*, pp. 1–29. <https://doi.org/10.1017/eso.2019.64>
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- Pilotti, A. 2015. "The Historical Changes and Continuities of Swiss Parliamentary Recruitment." *Swiss Political Science Review*, 21, pp. 246–253. <https://doi.org/10.1111/spsr.12163>
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- Rossier, T., Bühlmann, F. and Mach, A. 2017. "The Rise of Professors of Economics and Business Studies in Switzerland: Between Scientific Reputation and Political Power." *European Journal of Sociology*, 58, pp. 295–326. <https://doi.org/10.1017/S000397561700011X>

Research highlights:

The findings of the Swiss Elite Observatory can be summarised in four points: corporate networks, cross-sectoral elite coordination, internationalisation and feminisation of elites.

The first point relates to the historical evolution of Swiss business elite relations through corporate networks. At the beginning of the 20th century, business elites consolidated their relations by sitting on numerous company boards. As the industry relied on funding from financial companies, bankers were central in the corporate network. At the same time, top company owners started to organise collectively within state commissions and influential business associations. Founding families detained large shares of firms and inheritors would usually run them. After the First World War, the corporate network became increasingly integrated until the 1980s. However, from the 1990s onwards, the corporate network started to fragment again. Financialization led to the atrophy of connections between bankers and industrialists and the increasingly recruited foreign top managers had fewer incentives to be integrated into Swiss networks. Internal oppositions emerged between finance and industry, large and small firms and internationally or domestically oriented sectors of the economy. Overall, the corporate leaders relied less upon family forms of reproduction of economic capital, and more upon managerial and transnational forms of legitimacy (Mach et al. 2011, 2016; Bühlmann et al. 2012b; Ginalski 2013, 2015; David et al. 2009, 2015).

A second point refers to elite relations across sectors. Since the 1930s, elite relations intensified through various meeting places such as associations, party committees, the Federal Parliament or state expert committees. Elites were strongly interrelated and often occupied multiple institutional positions simultaneously. The lay parliamentary system allowed politicians to occupy several elite positions (Pilotti 2017); professors in law or economics (Bühlmann, Benz et al. 2017; Rossier et al. 2017) occupied prominent positions in business or administration. These proximities were reinforced by a homologous structure of educational credentials across the political and economic field (Bühlmann et al. 2012a). However, during the 1990s, the political system began to professionalise, while academia became more autonomous from business and politics (Pilotti, 2017). Elected officials reduced their multi-positionality and meetings in neo-corporatist expert committees lost in relevance. Therefore, Swiss elites became less integrated across sectors (Bühlmann, Beetschen et al. 2017).

A third feature relates to the changing internationality of the elites in Switzerland, in particular in the corporate and academic fields. In the early 20th century, the industrial sector was very internationalised and many corporate board members were not Swiss. However, as a result of protectionist policies, board directors became increasingly Swiss during the 1930s (David et al. 2015). Similarly, the academic elites, who often came from neighbouring countries in the early 20th century, underwent an important “nationalisation” in the 1930s. After the 1980s, both the economic and the academic field internationalised again.

Top managers of Swiss firms increasingly relied on transnational credentials, such as MBAs from renowned US universities (Davoine et al. 2015; Davoine & Ravasi 2013; Bühlmann et al. 2018). Meanwhile, in very internationalised disciplines, Swiss researchers begun to travel to top American departments for research stays, which boosted their scientific capital. Economics and natural science professors in Swiss universities detain a large share of “international capital” (Benz et al. 2020; Rossier et al. 2017; Rossier & Bühlmann 2018).

Finally, the Swiss elites have undergone a slow feminisation process. Women were almost excluded from company boards, executive positions and university professorships during the 20th century. Since 1971, women could be elected in the Swiss Parliament. In business, before the 1970s, the few women sitting on boards belonged to the families of firm owners. After those political developments, some entered company boards in the retail and distribution sector. Since the 1990s, more women came to sit on boards of Swiss corporations. As the federal administration promoted an equality policy in paragonovernmental companies and the internationalisation of the Swiss economy weakened the traditional “old boys clubs”, more women sit now on the board of (multinational) companies – even if these shares are still low in international comparison.

Transnational – Citizenship and residence by investment

Country: Transnational

List of researchers & university affiliations: Kristin Surak, LSE Sociology Department

Website(s): <https://www.lse.ac.uk/sociology/people/kristin-surak>

Key topics: investment migration, citizenship by investment (“golden passports”), residence by investment (“golden visas”). My focus is on the sale of citizenship and residence, and how the wealthy use these statuses as resources.

Data sources: I have carried out over 400 formal and informal interviews with people involved in all aspects of the global market in citizenship and residence, including lawyers, prime ministers, bureaucrats, due diligence providers, real estate developers, accountants, immigration consultants, and personal wealth managers. I have also completed a more limited number of interviews with the people who purchase citizenship or residence through investment. I have also carried out fieldwork over two dozen professional conferences for those working in the field of investment migration as well as in a number of countries with investment migration programs. Research sites include UK, Switzerland, Monaco, Malta, Montenegro, Greece, Cyprus, Russia, United Arab Emirates, United States, Canada, Saint Kitts, Antigua, Thailand, China, and Vanuatu.

Key methodological and analytical approach: I mainly engage the literatures on citizenship, mobility, and offshoring in my work.

List of publications:

Surak, K. 2020. “Millionaire Mobility and the Sale of Citizenship.” *Journal of Ethnic and Migration Studies*. DOI:10.1080/1369183X.2020.1758554
<https://www.tandfonline.com/doi/abs/10.1080/1369183X.2020.1758554>

Why do wealthy people purchase citizenship in peripheral countries? This article investigates the demand for citizenship by investment programmes, which enable naturalisation based on a donation or financial investment. Extending research on long-distance naturalisation among the middle class and on residence by investment programmes, I examine the motives of the wealthy using citizenship by investment options. Based on over one hundred interviews with rich naturalisers and intermediaries in the citizenship industry, I find that mobility, both in the present and as a future hedge, is a strong driver, followed by business advantages. Often it is privileges in third countries – not the place granting the citizenship – that are sought. In contrast to middle-class strategic naturalisers, quality of life, education options, and job prospects were not important, though navigating geopolitical barriers and risks were. Many naturalisers were not compensating for the failures of their citizenship at birth, but manoeuvring within a world of state competition. Finally, some individuals inverted the citizenship hierarchy and downgraded from

'first tier' memberships when, after years of living abroad, their nationality became a liability. The conclusion elaborates on the duplex structure of intra-state and inter-state inequality that channels demand, and the implications for citizenship more broadly.

Surak, K. 2020. "Who Wants to Buy a Visa? Comparing the Uptake of Residence by Investment Programs in the EU." *Journal of Contemporary European Studies*. DOI: 10.1080/14782804.2020.1839742
<https://www.tandfonline.com/doi/full/10.1080/14782804.2020.1839742>

The European Union has seen a proliferation of 'golden visa' programs that allow investors to gain residence in a country in exchange for a financial contribution. Despite substantial attention from Brussels and the media, no empirical study to date has systematically compared the outcomes of these increasingly popular schemes. Drawing on new government and public sources supplemented by interviews, this article offers the first comparison of the spread and demographic uptake of the programs, investigating trends in the country of origin, approval numbers, investment type, and family dependents, as well as the factors that affect demand and approvals. It also takes note of a small number of serial investor migrants – cases that may warrant heightened background checks. It concludes by assessing the significance of the flows and discussing the implications for residence by investment programs.

Surak, K. 2020. "Millionaires and Mobility: Inequality and Investment Migration Programs," in de Lange, T. (ed.) *Money Matters in Migration*. Cambridge University Press.

Surak, K. 2020. "What Money Can Buy: Citizenship by Investment on a Global Scale," in Fassin, D. (ed.) *Deepening Divides: How Borders and Boundaries Drive Our World Apart*. London, Pluto Press, pp. 21-38.

This chapter examines the intersection of *international* inequality in what citizenship secures and *intranational* inequality in wealth. It introduces the basic contours of elite wealth at a global level, as well as the operation of investment migration programs. It then addresses the trajectory of capital accumulation in the major regions of demand, as well as the key motives of buyers. It concludes by assessing the ways that inequality in what citizenship secures produces demand for such options, though it is largely those who have won out in a new capitalist system who can afford the opportunities. It also addresses whether or not investment migration programs significantly exacerbate inequality in the countries of origin.

Surak, K. 2016. "Global Citizenship 2.0: The Growth of Citizenship by Investment Programs." *Investment Migration Working Papers*, IMC-RP 2016/3. <https://investment-migration.org/download/global-citizenship-2-0-growth-citizenship-investment-programs/>

What explains the growth of citizenship by investment programs and what are the implications for citizenship more broadly? This paper investigates an under-studied yet rapidly developing avenue for naturalization: *jus pecuniae*, or the acquisition of citizenship

through financial contribution. The existing literature divides between exuberant economists touting the utility of market mechanisms to control political membership, and cautious political and legal theorists concerned about the effect of investor citizenship on democracy. Adding empirical grounding to these largely theoretical debates, this paper draws on qualitative fieldwork on the citizenship by investment industry and the countries that implement these programs to delineate the dynamics of *jus pecuniae* and its implications for citizenship more broadly. The analysis specifies the distinctive properties of citizenship as a commodity: the state plays a dual role as both sole producer and market regulator, and the use-value of citizenship depends on factors both internal and external to the granting state. It then situates formal citizenship by investment programs within a broader field encompassing immigrant investor visas and discretionary economic citizenship. And it identifies how this field conditioned the development and remarkable spread of these formal programs in recent years, and the role of geopolitical inequalities and industry actors in this transformation. In conclusion, it elaborates four ways in which consideration of *jus pecuniae* can contribute to our understanding of broader transformations in citizenship, including its relationship to strategic action, territory, inequality, and private actors.

Surak, K. n.d. "Commodifying Sovereign Prerogatives: How to Sell Citizenship."

How is a sovereign prerogative, like granting citizenship, brought to market? We know much about how states shape markets and vice versa, but less about the dynamics when states become independent actors within them, setting not only the market rules, but directly producing the product. This article unpacks the challenges of commodifying sovereign prerogatives by examining the market for citizenship by investment. Notably, the state holds multiple roles that generate conflicts of interest and a concern for credibility. To address these, states institute divisions of labor in issuing the product and outsource elements of supervision to third-party actors. The conclusion addresses how these mechanisms apply in the markets for other sovereign prerogatives, particularly government debt, and discusses the implications for our understandings of citizenship and neoliberalism.

Surak, K. and Tsuzuki, Y. n.d. "Are Golden Visas a Golden Opportunity? Assessing the Economic Outcomes of Residence by Investment Programs in the EU."

Residence by investment (RBI) programs, or "golden visa" schemes, are now found in half of all European Union member states. Yet no empirical studies have tested the economic drivers or impacts of these programs. Filling this lacuna, this article supplies the first comparative quantitative evaluation of the economic origins and outcomes of so-called golden visa programs in the European Union. Utilizing new data, we show that RBI programs are more likely to begin after a decline in economic growth, especially if it occurs during an economic crisis, and that the programs are generally targeted to address failing areas of the economy. Furthermore, we show that wealthy investor migrants are

better conceptualized as mobile populations akin to tourists, rather than as profit-motivated investors, and that countries price programs accordingly. We also find that the programs represent a miniscule proportion of foreign investment in most countries, and that the vast majority of the investments going into real estate even when other options are available. However, the impact on real estate markets is negligible, with the sole exception of Greece. The results suggest that states turn to golden visa programs to plug short-term economic gaps but with negligible economic impact.

Russian elites**Country:** UK**List of researchers & university affiliations:** Elisabeth Schimpfössl, Aston University**Website(s):** schimpfossel.com**Data sources:** Interviews with, and observations of, Russian billionaires and multi-millionaires**Key methodological and analytical approach:** Qualitative interviews; Weber/Mills/Bourdieu**List of publications:**

- Schimpfössl, E. 2021. "Rich Russians' Morality of Success." Submitted to a special issue in *Eastern European Politics and Societies and Cultures*.
- Schimpfössl, E. and Monteath, T. 2021. "The Sunday Times Rich List and the Myth of the Self-Made Man," in Atkinson, R. and Higgins, K. (eds.) *Peaks and Troughs: How the Other Half Lives*. Manchester, Manchester University Press.
- Yablokov, I. and Schimpfössl, E. 2020. "A Brief History of Newsmaking in Russia." *Journalism*. <https://journals.sagepub.com/doi/abs/10.1177/1464884920941951?fbclid=IwAR3JFPRlpBox78-36T7Qy0WQITV9i3Tyt4UZuBrIXdZFXw3OFwKzQWyZWLg&journalCode=joua>
- Schimpfössl, E. and Yablokov, I. 2020. "Post-Socialist Self-Censorship: Russia, Hungary and Latvia." *European Journal of Communication*, 35, 1, pp. 29-45. <https://schimpfossel.com/academic-publications/post-socialist-self-censorship-russia-hungary-and-latvia/>
- Monteath, T. and Schimpfössl, E. 2019. "The Culture of Elite Philanthropy: Russia and Britain Compared," in Duncan, P.J.S. and Schimpfössl, E. (eds.) *Socialism, Capitalism and Alternatives*. London, UCL Press, pp. 49-65. https://www.uclpress.co.uk/collections/subject_area-studies/products/111621
- Schimpfössl, E. 2019. "Russian Philanthrocapitalism." *Cultural Politics*, 15, 1, pp. 105-120. <https://schimpfossel.com/academic-publications/russian-philanthrocapitalism/#more-868>
- Schimpfössl, E. 2018. *Rich Russians: From Oligarchs to Bourgeoisie*. New York, Oxford University Press. Paperback published in August 2020. <https://global.oup.com/academic/product/rich-russians-9780190677763?cc=gb&lang=en&>
- Schimpfössl, E. 2018. "Culture, Power, and Social Disparity: Researching Russia's Upper Class," in Smart, B., Peggs, K. and Burridge, J. (eds.) *Critical Social Research Ethics*, 4 volumes. Los Angeles, SAGE, vol. 4, part II [reprint of 2014 article].

Schimpfössl, E. 2018. "Gender and Choice among Russia's Upper Class," in Attwood, L., Schimpfössl, E. and Yusupova, M. (eds.) *Gender and Choice after Socialism*. London, Palgrave Macmillan, pp. 109-131. <https://www.palgrave.com/gp/book/9783319736600>

Schimpfössl, E. 2014. "Russia's Social Upper Class: From Ostentation to Culturedness." *The British Journal of Sociology*, 65, 1, pp. 63-81. <https://onlinelibrary.wiley.com/doi/abs/10.1111/1468-4446.12053>

Research highlights:

My monograph *Rich Russians* (OUP 2018) examined the richest 0.1 per cent in Putin's Russia and explored their self-perceptions, ideologies and how they legitimise their fortunes. Bringing together economic and cultural sociological approaches to studying elites and power and based on in-depth interviews with 80 billionaires and millionaires, the book outlined how Russia's rich can be marked out as a new bourgeoisie.

This investigation of elite philanthropy in Russia examined whether and to what extent Russian billionaires have incorporated philanthrocapitalist ideas (see article on "Russian Philanthrocapitalism", 2019). While my interviewees revealed that philanthrocapitalist sentiments are prevalent, their charitable giving is indelibly ingrained with ideas reminiscent of the Soviet era. Most identified as belonging to the intelligentsia, which implies a measure of modesty and restraint. Some even pledged to disinherit their children and bequeath their fortune to charity instead.

A biographical database of British elites, which I developed together with Tim Monteath (LSE) during my Leverhulme Early Career Fellowship at UCL (2015-17), combined the *Sunday Times Rich List* with other data, including social background, ethnicity and education. We have used these data for two book chapters ("The Culture of Elite Philanthropy", 2019, and "*The Sunday Times Rich List and the Myth of the Self-Made Man*", forthcoming).

My project idea for the future is to explore the interdependencies between monied wealth, elite social acceptance and political power within and across national boundaries. Most studies are concerned with national elites; some with transnational. Very few, however, engage in an examination of the processes that turn newcomers (both new money and outsiders) into powerful players. How do they use their economic resources to consolidate themselves and negotiate structural hurdles in their efforts to enter an upper class or political establishment? How do strategies vary between elite groups and shift depending on the establishment they are seeking to break into – in short what works, what does not work, and why? I believe that asking these questions is important for several reasons, not least because, in the long run, the concentration of money and power risks eroding democracy.

In a first step, I intend to trace how UK-based superrich Russians attempt to use their private wealth to generate different forms of political power (informal and formal, indirect

and direct). An underlying assumption of the planned work is that social acceptance provides outsiders with access to networks and contacts where they can more effectively compete for, and procure, political and economic advantage. A particular subsequent interest for me, brought into focus by my recent research on self-censorship (see “A Brief History of Newsmaking in Russia”, 2020, and “Post-Socialist Self-Censorship”, 2020), is whether the proximity between wealth and power becomes intensified in democracies with drifting authoritarian tendencies.

United Kingdom – Great British Class Survey**Country:** UK**List of researchers & university affiliations:**

Mike Savage, Professor of Sociology, LSE.

Niall Cunningham, Senior Lecturer in Geography, University of Newcastle.

Fiona Devine, Professor of Sociology, University of Manchester.

Dr Sam Friedman, Associate Professor of Sociology, LSE

Daniel Laurison, Associate Professor of Sociology, Swarthmore College,

Liza McKenzie, Assistant Professor of Sociology, University of Durham

Andrew Miles, Professor of Sociology, University of Manchester

Helene Snee, Senior Lecturer in Sociology, Manchester Metropolitan University

Paul Wakeling, Professor of Sociology, University of York.

Other collaborators have included Johs Hjellbrekke (Bergen), Brigitte Le Roux (Paris V), Yaojun Li (Manchester), Mark Taylor (Sheffield).

Data sources: Great British Class Survey (large BBC web survey with 330,000 respondents), plus follow up qualitative interviews and ethnography

Methods: multiple correspondence analysis, latent class analysis, regression, geographical information systems and other multivariate tools

Main publications:

Cunningham, N. with Savage, M. 2015. "The Secret Garden? Elite Metropolitan Geographies in the Contemporary UK." *The Sociological Review*, pp. 321-348.

Cunningham, N. and Savage, M. 2017. "An intensifying and elite city: new geographies of social class and inequality in contemporary London." *City*, 21, 1, pp. 23-46.

Devine, F. and Snee, H. 2015. "Doing the Great British Class Survey." *The Sociological Review*, 63, 2, pp. 240-258.

Friedman, S., Laurison, D. and Miles, A. 2015. "Breaking the 'class' ceiling? Social mobility into Britain's elite occupations." *The Sociological Review*, 63, 2, pp. 259-289.

Laurison, D. 2015. "The right to speak: differences in political engagement among the British elite." *The Sociological Review*, 63, 2, pp. 349-372.

Savage, M. 2015. "From the 'problematic of the proletariat' to a class analysis of 'wealth elites.'" *The Sociological Review*, 63, 2, pp. 223-239.

Savage, M., Devine, F., Cunningham, N., Taylor, M., li, Y., Hjelbrekke, J., Le Roux, B., Miles, A. and Friedman, S. 2013. "A New Model of Social Class? Findings from the BBC's Great British Class Survey Experiment." *Sociology*, 47, 2, pp. 219-250.

- Savage, M., Devine, F., Cunningham, N., Friedman, S., Laurison, D., Miles, A., Snee, H. and Taylor, M. 2014. "On Social Class, Anno 2014." *Sociology*, 49, 6, pp. 1011-1030.
- Savage, M., Cunningham, N., Devine, F., Friedman, S., Laurison, D., Mckenzie, L., Miles, A., Snee, H. and Wakeling, P. 2015. *Social Class in the 21st century*. London, Penguin.
- Savage, M., Hecht, K., Hjellbrekke, J., Cunningham, N. and Laurison, D. 2017. "The anatomy of the British economic "elite"," in Korsnes, O., Heilbron, J., Hjellbrekke, J., Bühlmann, F. and Savage, M. (eds.) *New Directions in Elite Studies*. Routledge, pp. 158-182.
- Wakeling, P. and Savage, M. 2015. "Entry to Elite positions and the stratification of higher education in Britain." *The Sociological Review*, 63, 2, pp. 290-320.

Main research highlights:

The GBCS attracted major interest when initially published in 2013 for offering a new 'seven class' model of social class which differed from conventional measures of occupational class using NS-Sec and related tools. Of particular interest was the delineation of a distinctive 'elite' class, characterized by disproportionately high amounts of economic, social and cultural capital.

Although there was considerable controversy about the GBCS, the high response rate from people with high levels of economic, cultural and social capital allowed the data to be used to generate unusually granular findings about UK elites, which had not previously been possible using survey data. These include

- The different prospects of graduates from amongst Russell group universities, with the 'golden triangle' graduates obtaining disproportionate advantage.
- The variegated geography of elites within various districts of London, including the separation between legal, business and cultural elites, and the role of elites in driving urban change in central London property markets.
- The significance of a social mobility 'class ceiling' whereby those in professional and managerial occupations from working class backgrounds were frequently paid less than those from such backgrounds.
- The power of elite social networks and the significance of 'top end' effects in which small numbers of the 'right tail' of the economic distribution had distinctive elite contacts, and disproportionate political power.
- The confidence of elites in engaging with social research methods and displaying reflexivity.

United Kingdom – The British elite**Country:** UK**List of researchers & university affiliations:**

Aaron Reeves, Department of Social Policy and Intervention, University of Oxford

Sam Friedman, Department of Sociology, University of Oxford

Website(s):<https://www.spi.ox.ac.uk/people/dr-aaron-reeves><https://www.lse.ac.uk/sociology/people/sam-friedman>**Data sources:**

We are currently collecting and combining data from a variety of sources.

1. Who's Who and Who Was Who: ~120,000 entries covering the period 1897 to the present (over roughly 1830 to the present in terms of year of birth. The data contains year of birth and death (if they deceased), family relationships, careers, club membership, recreations, and education. Almost all of the fields are self-reported.
2. Oxford Dictionary of National Biography. A collection of historical essays summarising the lives of prominent people in British history. It covers people from the Roman period to the present. There is also metadata that is collected for almost all of the individuals in the ODNB and this includes details about family background, occupation, partners, and even wealth at death.
3. Companies House. A register of every limited company in the UK. This data contains the names of the owners and operators of these firms. The data covers the last 20 years and is the complete universe of cases. It provides an indication of the degree of economic capital some individuals have acquired. There are significant limitations to this data, however. We only have very basic information about the individuals themselves, such as age and nationality. Gender and ethnicity could be extracted from some information on names.

Key methodological and analytical approach:

Our analytical approach has been largely prosopographical and in this respect we have been influenced by the literature on elite formation and recruitment. We have been interested in documenting the degree to which certain institutions or sites of elite formation have been present in the biographies of those included in elite directories, such as Who's Who. There has certainly a Bourdieu-inspired inflection to the work we have done using this approach and this can be mostly clearly seen in our recent paper on elite recreations. This paper was less prosopographical and more interested in the shifting styles of elite distinction and how these have changed over time.

Methodologically, we have been drawing on a range of quantitative tools. These have included have ranged across classic methods of class analysis, such as calculating odds ratios, but they have also included some methodological innovations too. We apply for example time series methods, such as regression and structural break tests, to identify the impact of policy changes on elites. Moreover, in our most recent paper, we have used quantitative text analysis, such as structural topic models and semi-automated content analysis, to understand how people perform their tastes publicly.

List of publications:

Friedman, S. and Reeves, A. 2020. "From Aristocratic to Ordinary: Shifting Modes of Elite Distinction." *American Sociological Review*, 85, 2, pp. 323-350. <https://journals.sagepub.com/doi/full/10.1177/0003122420912941>

Reeves, A., Friedman, S., Rahal, C. and Flemmen, M. "The Decline and Persistence of the Old Boy: Private Schools and Elite Recruitment 1897 to 2016." *American Sociological Review*, 82, 6, pp. 1139-1166. <https://journals.sagepub.com/doi/full/10.1177/0003122417735742>

Research highlights:

As mentioned above, we (Sam Friedman and Aaron Reeves) have been analysing the entire 120-year historical database of Who's Who – a unique catalogue of the British elite. So far this has generated two papers. In the first we examine the changing relationship between Britain's most elite private schools - the nine 'Clarendon Schools' (including Eton, Harrow, Westminster etc.) - and recruitment into the elite. We find that the propulsive power of these elite schools has both diminished significantly over time and yet remains doggedly persistent. 'Old Boys' who attended Clarendon schools, for example, are still 94 times more likely to enter Who's Who than those attending any other non-public school.

Our most recent paper examines how the British elite signals its status through the consumption of culture. Drawing on the 'recreations' listed by Who's Who entrants, our results reveal three distinct stages of elite culture. First, a dominant mode of aristocratic practice forged around the leisure possibilities afforded by landed estates which waned significantly in the late 19th century. Second, a highbrow mode dominated by the fine arts which increased sharply in the early 20th century; and, third, a contemporary mode characterised by the blending of highbrow pursuits with more everyday cultural participation. These shifts, we argue, not only reveal changes in the contents of elite culture but also chart the emergence of a distinct contemporary mode of 'ordinary' elite distinction that publicly emphasises everyday cultural practice (to accentuate authenticity and cultural connection) while at the same time retaining many tastes that continue to be misrecognised as legitimate.

United Kingdom – Economic elites’ beliefs in meritocracy & Sutton Trust Study on mobility**Country:** UK**List of researchers & university affiliations:**

Katharina Hecht, University of Konstanz (affiliations: LSE III, University of Pennsylvania)

Mike Savage (LSE), Sam Friedman (LSE), Daniel McArthur (Oxford)

Website(s):[University of Konstanz](#)[LSE](#)[Annette Lareau ‘Families and Money’ Study](#)**Katharina Hecht PhD Research****Data sources:**

The main data source of the thesis is interviews with 30 UK-based top incomes earners, a majority of whom work in finance. Interviews are well-suited for researching lived experiences and understanding ‘the micro-level practices that constitute’ cultural processes (Sherman, 2018; Lamont and Swidler, 2014; Lamont et al., 2014, p. 24).

Further, a descriptive analysis of top income earners and the prevalence of meritocratic beliefs among Great British Class Survey (GBCS) respondents was also conducted, see Savage et al (2018).

Key methodological and analytical approach:

The thesis takes an intersectional-feminist approach to elite studies.

List of publications:

Savage, M., Hecht, K., Hjellbrekke, J., Cunningham, N. and Laurison, D. 2017. “The anatomy of the British economic “elite”,” in Korsnes, O., Heilbron, J., Hjellbrekke, J., Bühlmann, F. and Savage, M. (eds.) *New Directions in Elite Studies*. Routledge, pp. 158-182.

Hecht, K. 2017. “A Relational Analysis of Top Incomes and Wealth: Economic Evaluation, Relative (Dis)advantage and the Service to Capital.” *LSE International Inequalities Institute Working Paper 11*. London, The London School of Economics and Political Science. Retrieved from <http://www.lse.ac.uk/International-Inequalities/Assets/Documents/Working-Papers/Katharina-Hecht-A-Relational-Analysis-of-Top-Incomes-and-Wealth.pdf>

Research highlights:

The research focuses on economic elites, specifically on top income earners of which a majority are also among the top 1 percent of wealth owners. The findings highlight the importance of beliefs in meritocracy and the market’s ability to distribute resources fairly

for top income earners' perceptions of inequality. This finding corroborates the literature on perceptions of economic inequality and studies of elites which have established the importance of meritocratic beliefs for the legitimation of inequality. However, these studies have yet to sufficiently address how systems of evaluation sustain ideals of meritocracy. Specifically, I focus on the role of performance pay as justification for meritocracy. Drawing on in-depth interviews with 30 UK-based participants, I analyse how top income earners perceive economic inequality, as measured by top income shares. Participants explained that top incomes reflect economic value 'created'. Performance pay is essential for participants' legitimation of inequality. Indeed, as market-based performance pay does not have a fixed upper bound, any difference in incomes is viewed as justified as long as it is based on economic contribution. Performance pay draws attention to narrow, economic criteria of evaluation. Hence, a majority of participants described top incomes as deserved and were not concerned about rising inequality. Nevertheless, a minority, who had applied broader evaluative criteria including distributive justice and social contribution were concerned about rising inequality. Extending previous studies of elite's investment in meritocracy, I highlight that performance pay is not only used as a legitimating narrative, it is also a material reality in top income earners' lives. Evaluative tools at the top of the distribution matter, indicating that we need to focus our attention not just on meritocratic views of 'elite' individuals but also their 'meritocratic' evaluation systems. Such a focus connects the study of elites to wider processes in the economy.

Sutton Trust Study: Social and Geographic Mobility into Britain's Elite Occupations¹

Data sources:

We use data from the Office for National Statistics Longitudinal Study (LS), a 1 percent sample of linked census records of the population of England and Wales, which links individuals across the five decennial censuses between 1971 and 2011. The LS includes linked events data (i.e. births, deaths and cancer registrations). The very large sample size (>500,000 individuals per wave) and long duration make the LS an excellent, if underused, resource for studying social and geographical mobility, especially given that long distance mobility is a relatively rare event in most people's lives.

¹ Acknowledgement and disclaimer: The permission of the Office for National Statistics to use the Longitudinal Study is gratefully acknowledged, as is the help provided by staff of the Centre for Longitudinal Study Information & User Support (CeLSIUS). CeLSIUS is funded by the ESRC under project ES/V003488/1. The authors alone are responsible for the interpretation of the data.

The work contains statistical data from ONS which is Crown Copyright. The use of the ONS statistical data in this work does not imply the endorsement of the ONS in relation to the interpretation or analysis of the statistical data. This work uses research datasets which may not exactly reproduce National Statistics aggregates.

Key methodological and analytical approach:

We define elite occupations as higher managerial, administrative, and professional occupations, (the National Statistics Socio-economic Classification Class 1 (NSSEC 1)). Following Laurison and Friedman's (2016) pioneering approach to analysing social mobility into elite occupations, we distinguish four possible social origins: respondents' whose parents also held higher managerial, administrative, and professional occupations (NSSEC 1) and are hence *intergenerationally stable*; those whose parents held lower managerial and professional occupations (NSSEC 2) – the *short-range mobile*; those whose parents who were in intermediate and clerical occupations, were self-employed or own account workers, or employed in lower supervisory and technical occupations (NSSEC 3-5) – and are hence *mid-range mobile*; those whose parents were employed in semi-routine and routine occupations (NSSEC 6-7) and were *long-range mobile*. We define geographic mobility as long-distance mobility (moving further than 28 kilometres (17.4 miles) between pairs of censuses – the top quartile of distance moved).

List of publications:

Hecht, K., McArthur, D., Savage, M. and Friedman, S. 2020. [Elites in the UK: Pulling away?](#) Sutton Trust Report.

Hecht, K. and McArthur, D. (*work in progress*). "Changing places. The 'Area Gap' in a study of social and geographic mobility into Britain's highest social class occupations."

Research highlights:

We introduce findings from the first longitudinal analysis of social and geographic mobility into Britain's higher professional and managerial occupations. Our approach focuses on geographic moves and social mobility trajectories into Britain's highest social class occupations (following Laurison and Friedman 2016) to address the 'missing link' between social and geographic mobility (Savage 1988). Our research therefore centres around occupational elites.

We find that the class origin of occupational elites shapes their geographic mobility as well as the level of affluence in their residential area during adulthood. These outcomes matter because internal migration may offer employment and wage gain opportunities (Greenwood 1997; Sorenson and Dahl 2016) and because more affluent districts on average offer better educational outcomes (Gingrich and Ansell 2014) and better life chances for children (Chetty, Hendren and Katz 2016; Chetty and Hendren 2018).

The social origins of occupational elites matters for their geographic mobility. Specifically, individuals with elite occupations who are from privileged backgrounds are more likely to have been geographically mobile, i.e. more likely to have moved long-distance, than those who were socially mobile into elite occupations. While a majority of the stable elite (i.e. those whose parents already held elite occupations) have moved long-distance at

least once, only a minority has done so among those who were long-range socially mobile into elite occupations. In other words, geographic mobility is correlated with advantaged social backgrounds. Therefore, elite social class backgrounds are not only associated with place, but also with the ability to *change* places.

Regardless of social background, when occupational elites move long-distance, they move to more affluent areas. However, people with elite occupations from privileged backgrounds have grown up in more affluent areas during childhood than those from working class backgrounds, meaning that the stable elite already started out in relatively advantaged areas. To borrow a metaphor from Savage (2015), these occupational elites have started their mountain climb to reach greener pastures at a higher altitude than those from working class backgrounds. Further, even if they, the socially mobile, do undertake a long-distance move, they do not catch up with their peers from privileged backgrounds regarding the affluence level of the area where they live as adults: there is an '*area gap*'. This suggests that the upwardly socially mobile face an unachievable 'moving target' if they move long-distance to improve their area of residence during adulthood. Further, our analysis demonstrates that place-based differences related to disadvantaged social origins are not wiped away by geographic and social mobility. Geography lingers, even when people move.

United Kingdom – Elite philanthropy**Country:** UK**List of researchers & university affiliations:**

Luna Glucksberg, International Inequalities Institute, LSE;

Louise Russel-Prywata, Open Ownership/Atlantic Fellows III;

Jessica Sklair, Margaret Anstee Centre for Global Studies, Newnham College, University of Cambridge.

Data sources:

Sunday Times Giving List (STGL);

Sunday Times Rich List (STRL);

Orbis database, an internationally recognised source of company information containing 250 million companies globally;

Interviews with Family Offices and philanthropists in the UK and Brazil;

Wealth-X 2020 Spotlight on Major Giving 2020;

Family Offices own websites and ‘gray’ literature.

Key methodological and analytical approach:

Our work brings together traditional sociological elite studies, ethnographic research with UK Family Offices and philanthropists, and social network analysis, to show the connection between elite philanthropy and givers’ financial interests, as well as the wealthy families’ own motivations and rationale to engage in philanthropy at scale. We foreground the gendered aspect of philanthropy, showing how women in elite families play a significant role in the strategic use of charitable activities to maintain and advance the family as a long lasting dynasty.

List of publications:

Glucksberg, L. 2018. “A gendered ethnography of elites: women, inequality, and social reproduction.” *Focaal*, 81, pp. 16-28.

Glucksberg, L. and Burrows, R. 2016. “Family offices and global elites.” *Sociologica*, 2.

Glucksberg, L. and Russel-Prywata, L. 2020. “Elites and Inequality: A Case Study of Plutocratic Philanthropy in the UK.” UNRISD, Occasional Paper 9.

Russel-Prywata, L. 2019. *Elite Philanthropy in the UK: Plutocratic Influence or Driver of Public Good? An analysis of the philanthropic and business activities of leading UK philanthropists, and their implications for the role of the state in legitimising and incentivising private giving for public good*. LSE, MSc Dissertation.

- Sklair, J. 2016. "Philanthropy as Salvation: Can the rich save the world and should we let them try?" *Voices from Around the World* (Online Journal, Global South Studies Center Cologne), Jan. Issue.
- Sklair, J. 2018. "Closeness and critique among Brazilian philanthropists: Challenges for a critical ethnography of wealth elites." *Focaal – Journal of Global and Historical Anthropology*, 81, pp. 29-42.
- Sklair, J. and Glucksberg, L. 2020. "Philanthrocapitalism as Wealth Management Strategy: Philanthropy, Inheritance and Succession Planning among the Global Elite." *The Sociological Review*, pp. 1-16.

Research highlights:

Our work investigates elite philanthropy, demonstrating how the UK too is characterised by what was hitherto considered a US prerogative, ie plutocratic philanthropy. Furthermore we show how philanthropy is used as a distinctive wealth management strategy by elite families, and highlight the role of women and gender in these very opaque, 'behind the scenes' social processes.

Firstly we show the emergence of a distinct form of UK plutocratic philanthropy. The rather sparse literature on elite philanthropy and giving at scale has so far focused almost exclusively on the US: elite philanthropy in the US is described as plutocratic (Callahan, 2017) and anti-democratic (Reich, 2018). It is argued to be ineffective (Giridharadas, 2018), and self-serving (Ostrower, 1997). Links between philanthropists and corporations are central to these arguments. However, the UK has one of the largest philanthropy industries outside the USA, which is growing rapidly (Milner, 2018). We use social network analysis to analyse the board level connections of UK elite philanthropists to companies and charitable entities, and in doing so demonstrate the presence of elite philanthropy in the UK, and suggest that it is primarily undertaken by individuals who are concurrently active in the corporate world.

Secondly, we show how philanthrocapitalism is used by elite families as a wealth management strategy, to actively consolidate and reproduce wealthy families over generations and translate them into successful dynasties over time. In order to do so, consultants and wealth managers have to ensure that inheritances are passed on smoothly and without 'ruptures' of the family, in the form of disagreements, estrangements or break ups. In this process, advisors draw on the philanthropic imagination to style wealthy families as custodians of both private capital and the common good, thus mirroring the narratives used by philanthrocapitalists to legitimise their wealth in the public sphere. Here, however, the discourse of philanthrocapitalism is turned inwards to the private realm of the family, to persuade younger generations to rally around the collective project of the custodianship of wealth. By bringing together research on elite philanthropy and inheritance, our research contributes to the growing sociological literature on elites and the global inequali-

ties driven by their accumulation of wealth. We show how wealth accumulation is increasingly dependent not only on the mechanics of financial markets and inheritance flows, but also on affective wealth management strategies framed around ethical notions of kinship and social responsibility.

Thirdly, and bringing together our two previous strands, we delve deep into the mechanisms and affective relations within elite families, to bring to the fore the often neglected issue of gender within wealth studies. Although data show that philanthropy at scale is mostly engaged in by men (Wealth-X 2020) our ethnographic work suggests that it is women who take on the responsibility for charitable work in the broadest sense (Glucksberg 2018). From this perspective the work that women do is, quite literally, invisible – their names do not feature prominently, for example, on giving lists – and yet it is crucial in the strategic and relational side of navigating philanthropy successfully within elite families. By taking care of the moral values of the family, by sharing their experiences with their children and labouring the ‘goodness’ that the family is involved in, women ensure that the positive aspects of wealth accumulation – the ability to give at scale – are foregrounded, whilst the ‘less palatable’ aspects of the family business are elided.