

A Quest for Justice

Theoretical Insights, Challenges,
and Pathways Forward

Edited by
M. Onur **Arun**
Jonathan Leif **Basilio**

A Quest for Justice stands as a competently curated work by two promising academics who, with courage, have embraced the critical social sciences tradition —a need that resonates strongly in contemporary justice studies. Justice remains a never-ending exploration, an expedition not only driven by the functional necessities that keep civilizations standing but also rooted in one of humanity's most primal values. *A Quest for Justice* conveys this complex notion implicitly, resonating from its very title to its closing words.

With its diverse approaches from political sociology, social policy, and political philosophy, the book delivers a robust and systematic collection of genuine and plausible ideas. Crafting a tapestry of theoretical and praxis-oriented insights, scholars from Turkey, the United States, Germany, Chile, Belgium, and the United Kingdom lay bare the difficulty of ensuring justice amid the myriad social maladies our societies face today. This volume transcends traditional paradigms, interweaving theory and practice, inviting readers to reflect, engage, and act in the ongoing pursuit of a living justice.

Judge Engin Yıldırım
The Constitutional Court of Türkiye



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M. Onur Arun and Jonathan Leif Basilio

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Onur and Jonathan

A Quest for Justice: Laying the Foundations

M. Onur Arun¹ and Jonathan Leif Basilio²

The pursuit of a just society has perennially stood as a paramount undertaking in human history. This preoccupation, rooted in the recognition that justice—or a societal structure aligned with principles of justice—constitutes an indisputable universal value that can be viewed as fundamental to the human condition. Though delineating basic human values often ignites spirited contention within academic circles, the aspiration for a just society remains an unparalleled concern among scholars. Adjacent to this consensus, however, pursuits to define justice manifest as a profoundly disputed terrain. Perhaps it is this intrinsic complexity of justice that impedes the struggles to crystallize a singular, comprehensive definition. One that also possesses both universal applicability and cross-cultural resonance. Some might contend that crafting such a definition is superfluous. However, the mutable characteristics and exigencies of human communities render the pursuit of a definition of justice that is imbued with adaptability an inescapable imperative. Once this dynamic nature of justice is accented, we believe the futility of perfectionist but ultimately fallible endeavors to circumscribe just decisions, actions, and policies is brought to light. It becomes apparent then that the notions and subjects

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invoked in justice exhibit a similar dynamism that mirrors alterations and evolutions as history progresses. Within the realm of justice studies, disparate viewpoints have a way of invigorating and complicating the discourse. This complexity is poignantly exemplified in the different interpretations of inequality—a foundational principle in the quest for justice that discloses its diverse and often contentious nature.

Some scholars view inequality as an unequivocal blemish in modern societies, requiring concerted, impartial efforts to diminish or eliminate it. It is perceived as an impediment to fairness, or it is a hindrance to attaining a genuinely just society. Other scholars posit that inequality is not only intrinsic but an indispensable aspect of justice itself. Within this contrasting perspective, disparities in treatment within particular contexts are deemed not only permissible but morally and functionally indispensable. Notions of merits and deserts within libertarian conceptions of justice epitomize this stance. Such dispositions acknowledge specific forms of inequality as requisite elements of a harmonious societal arrangement. In addition, some forms of philosophies that combine both egalitarian and libertarian concerns endorse particular forms of inequality. The notion of equality of opportunity, for instance, emphasizes providing equal opportunity at the outset of a competitive process in order to legitimize disparities in outcomes. If equality is ensured at the inception of the competitive process, then inequality is not an aberration but foreseeable and defensible. These interpretations of inequality help us make sense of the intricate nature of justice itself. Far from lending itself to a monolithic or universally applicable definition, justice is a concept that demands careful inspection of several factors. These can comprise of contextual, structural, and individual-centric variables that must be judiciously assessed and balanced when determining ethical actions or policies within specific circumstances.

In approaching the quest for just outcomes, the terrain of justice studies is marked by comprehensive views that extend beyond mere distributive considerations. These not only

demarcate who should receive what but also articulate the principles that underpin these determinations. In conjunction with these comprehensive frameworks, other viewpoints proffer specific orientations concerning the focal points of distribution. These normative perspectives inspired by broader theories of justice may further manifest as sociological, political, and moral critiques of them. Considering the issues these studies raise and assuming the diverse sociological, economic, political, and anthropological structures of societies, we are precluded from the inadequacy of a simple or solitary definition of justice. Thus, shedding light on the diverse, alternative, and sometimes contending definitions of justice offers promising pathways for understanding its intricate nature. Exploring the various facets and interpretations of justice and its connotations in this way may provide valuable insights that may be more productive than a definitive understanding.

Exploration and Breadth of Justice Studies

This volume explores justice and its diverse, comprehensive, and often competing views. Our aim extends beyond delineating the contours of justice. The authors of each chapter we invited seek to engage in an insightful discourse on some of the most pressing issues of our era—from environmental considerations to paradoxes in taxation, legal frameworks, and social and cultural arrangements, to particular policies such as basic income, along with overarching theories of justice. The spread of these subjects illustrates the pervasive nature of justice studies that resonate across the social sciences.

Justice is not only salient in specialized corners of academia. It permeates our collective intellectual inquiry. This widespread engagement, however, underscores its demanding complexity. Reflecting on the pursuit of equality in health care, education, or housing brings forth a multitude of challenges. Within societal aspirations for overarching equality, such endeavors may seem unequivocally just. Intricate moral dilemmas are often brought to light in these endeavors. This

presents a challenge to clear-cut or straightforward solutions. For instance, the goal of equal utilization of healthcare might necessitate, on both moral and economic grounds, increased taxation to support those unable to pay, a policy that undoubtedly will be unfavorably contested by some. Environmental concerns might prompt regulations on certain businesses, which can be viewed as a restriction on their freedom of enterprise. Such decisions, inspired by belief or sentiment in the environment as a common good, must be carefully weighed and justified, particularly mindful of the extent they constrain individual liberties.

These complex scenarios disclose that the path to justice is rarely straightforward. Decisions in these areas often require a delicate balance between moral imperatives and utility and pragmatic considerations. The historical evolution of citizenship rights, with its roots in the ancient civilizations of Sparta and Athens, where rights, entitlements, and opportunities were often linked to responsibilities and duties, illustrates this complexity. This logic continues to inform debates over resource allocation today. How can we justify allocating resources from taxpayers to the needy and poor in spheres like free health care or education? Doing so does not only require us to make a political decision that functionally justifies uploading an extra fiscal burden on non-poor middle and upper social classes as bearers in order to reallocate resources to the needy ones. Navigating these challenges requires both political and moral acumen. Political decisions may justify financial burdens on certain social classes. Moral decisions may call for an equitable distribution of resources. These realms may sometimes conflict and lead to indecision or, worse, opting for one at the expense of the other. Adding to this complexity are the cultural and anthropological nuances that must be considered. Communities may value different aspects of life, for example, prioritizing religious practices over education. Such variations add further layers to the intricate task of building a just society.

The Intersectional Nature of Injustices

As can be seen, the quest for just decisions in our modern era is fraught with complexity that is shaped by distinct sociological, political, and economic configurations. The challenges are real, not merely theoretical. They demand action. They call for concrete justifications, policy suggestions, or decision proposals. It is precisely this complexity that renders justice a demanding issue, yet it is not an insurmountable one. Thanks to advances in justice studies, scholars have crafted various tools and explanations to engage with the indeterminate nature of injustice in our time. Intellectuals, for example, such as Crenshaw (1989), Collins (1990), Honneth (1995), and Fraser (1997), have significantly shaped our essential understanding that various forms of injustice are intersectional in nature.

Consider the injustice experienced by an individual due to low economic status that manifests in their inability to access health care or education. If this disadvantage arises from discrimination related to gender, race, or age, mere redistribution of resources may be inadequate. Justice in these situations calls for a more sophisticated approach. Addressing this problem, in part, can begin with recognizing the interactions among these various social categorizations and considering them collectively.

Let us expand on this notion. Picture a low-income individual in a bustling urban city who benefits from local policies that provide public health care, and compare this with the same individual in a remote rural area with scarce medical facilities. In this thought experiment, the individual's inability to access health care might involve not only economic barriers but also legal status, geographical location, and cultural norms. The legal schema may hinder access based on immigration status, while spatial differences might create imbalances in available medical facilities. Simultaneously, cultural attitudes toward health care might facilitate or obstruct access. When we compare the pronounced disparities in healthcare access for African Americans during segregation and the Jim Crow era and the shifting challenges and

advancements in the post-segregation period, we recognize the mutable nature of inequalities that are shaped by legal frameworks, economic conditions, geographical settings, and cultural norms across historical periods. This comparison highlights not only the variability across geographical locations but also of evolving eras. Legal frameworks and jurisdiction during specific periods also contribute to these differences and, hence, must also be considered in evaluating inequalities. Let us now imagine an immigrant without proper legal documentation, trying to avail of health care but facing legal barriers. This intersection of legal status, migration, and economic disadvantage reveals how legal considerations add a unique layer to resource utilization. Laws and regulations, far from being impartial, actively shape power relations and define legal rights and responsibilities, which in turn shape individual experiences.

Legal Arrangements and Social Norms

Our examples persist: a woman, impoverished, living in an oppressive community, facing barriers based on her gender that hamper her access to education. Nearby, a differently-abled neighbor faces impediments to healthcare. The possibilities are endless, but therein lies the reality. Traditional perspectives on intersectionality, while gaining traction, often overlook the complex elements we have just outlined. This narrow focus can lead to an incomplete understanding of or misconceptions about inequalities.

The complexity of justice transcends mere intersectionality. The interaction we refer to here now involves the dynamic interplay of structural elements within a social context that generates unique types of cross-sectionality that significantly influence an individual's life prospects and opportunities. Ponder the intricate relationship between legal arrangements and social norms. In certain cultures, a social norm may exist that deems it inappropriate for women to drive. This normative stance can materialize into formal legal prohibitions that create a synergistic effect where law and social convention

reinforce each other. The meeting of these factors then amplifies the difficulty for women to access this particular freedom, as has occurred in some Arab countries in the recent past. As we can see, this intersectional complexity extends beyond the interplay of individual characteristics and societal norms. They permeate various dimensions of human existence. This leads us to an insight that a singular, all-encompassing theory of justice is inadequate for these purposes. The diverse and multi-angular nature of justice demands a critical approach that is adaptable, dynamic, and responsive to different contexts and cases.

As we conclude our discussion on this topic, we also propose that notions of intersectionality must extend beyond the interplay of individual features to include that of general structures and societal norms to the level of addressing the various dimensions of human life that we have identified. The complex nature of justice challenges us to consider specific manifestations of perceived inequality and injustice. These examples above, particularly as they relate to various and unique social contexts, show justice as a concept that is not static nor confined to rigid categories or simplistic analyses. It is fluid, evolving, and deeply contextual. Any exploration of justice must recognize the multiplicity of the components that shape it. We must embrace a perspective that allows us to navigate the intricate areas of law, social norms, individual characteristics, broader societal structures, and so on. This context-specific approach not only advances our understanding of justice but also equips us with the intellectual means to address inequalities and injustices more meaningfully. It invites us to see justice not as a monolithic or inflexible principle, but as a living concept that resonates with the issues defining our contemporary era.

Fair Distribution of Goods and Evils

While much attention has been given to the distribution of goods, values, and opportunities, the allocation of “evils” (e.g., various forms of undesired outcomes of an agent’s choices

and actions such as poverty, unemployment, and so forth) also warrants equal consideration in broader justice studies. Libertarian scholars often implicitly emphasize that a just society not only fairly distributes goods but also establishes institutional mechanisms to allocate evils fairly, or in other words, undesired outcomes. Unlike absolute egalitarian philosophers, these scholars are more concerned with individual responsibility, desert, free choice, and/or free will. Theirs is a system of institutions that distributes both goods and evils according to individual choice and accountability. They assert that rewarding everyone with the same outcomes regardless of the decisions they make in life means that no one takes responsibility for their own actions. Even though libertarian scholars are challenged by structuralist views advocating that there is no free will, and individuals' choices are shaped and constrained by a broader structure of injustice and inequalities, the concepts of individual choice and responsibility remain powerful tools in the arsenal of right-wing libertarian thought against egalitarian views. This is because if equality in the outcomes is enforced in a way where everyone is entitled to the same equal outcomes (e.g., resources, wealth) regardless of what they choose to do and be in life, then those who are hard-working, talented, and disciplined are contingently punished by being equalized with those who are lazy, undisciplined, and criminal. In this regard, ensuring justice, according to libertarians, requires not only the allocation of rewards to those who deserve them for their meaningful choices but also the allocation of evils to those who make irresponsible and idle choices. Although libertarians have a strong moral argument, the egalitarian criticism of this perspective, which holds that there is no free choice and the structure of injustice constraints people from making meaningful choices, also equivocally deserves consideration.

Transitioning to a different perspective, Foucault's (1977) analysis of the societal mechanisms of power and control (e.g., surveillance, disciplinary institutions like prisons and schools, and the normalization of certain types of behavior

through legal and social norms, and so on) led him to argue that punishment serves not only as retribution but as a means to shape social behavior. This perspective challenges traditional notions of justice by describing how power is exercised through disciplinary mechanisms. Building on Foucault's ideas, Rose (1999) examines governance and political theory through the lens of "governmentality". Rose explores how modern governance techniques, including the legal system, shape the dispensation, within the frame of our discussion, both goods and "evils", through its power to influence individual behavior and societal norms. The exercise of power, he insists, is not merely about coercion but involves the shaping of citizenship, freedom, autonomy, responsibility, and its similar cognates. Thus, in this context, the fair distribution of "evils" is not just a matter of legal judgment. It is intertwined with broader political strategies and societal values.

Kantian moral philosophy, centered on individual autonomy and rationality, posits that punishments must correspond with the severity of wrongdoing and must honor human dignity. While we might sense an overemphasis on retribution in this particular view, the task of a just society includes striking a balance between individual rights and the broader welfare of the community. Adding to this intricacy, utilitarian perspectives suggest that punishments should deter future wrongdoing. Its critics argue, however, that this could lead to excessive punishment—yet the goal of a just society is to navigate this tension between individual rights against the collective good with care.

A morally grounded legal system necessitates that laws resonate with deeper ethical considerations. We get a good example in Zehr's (1990) approach to restorative justice which represents a significant shift in the area of justice and punishment. He proposes a restorative model that is more consistent with the needs of victims and offenders, emphasizing healing and reconciliation. Rather than solely punishing the offender, Zehr's approach seeks to repair the harm caused by criminal behavior. Restorative justice brings together victims,

offenders, and community members in a dialogue that fosters understanding, empathy, and mutual accountability. This process seeks to restore relationships and reintegrate offenders into the community. The collaborative work of Pranis and colleagues (2003) offers practical insights into implementing restorative courses of action that Zehr has brought to light. They focus on community involvement, emphasizing the importance of dialogue and mutual understanding in resolving conflicts. Their work recognizes the interconnectedness of individuals and communities and the importance of empathy, understanding, and restoration in the fair distribution of “evils”. In this light, as is the practice in some countries, appointing supreme court judges who are also educated in philosophy is more than symbolic. It reflects an understanding that legal decisions must be tempered by ethical considerations. This understanding recognizes that the complexity of justice goes beyond mere legal reasoning and requires a broader perspective that considers ethical, social, and cultural dimensions.

(In)justice and (In)equality: A Nuanced Perspective

Inequality and injustice represent two distinct but interconnected concepts, although they are often conflated in public discourse. Inequality denotes disparities in status, opportunities, or resources among individuals or groups. Injustice refers to an unfair distribution or treatment in these same areas. Importantly, not all inequalities are inherently unjust; some may be morally defensible or even desirable. Rawls, for example, introduced the idea that inequalities can be morally justifiable when organized to benefit society’s least advantaged members (Rawls, 1999 and 2001). This idea, encapsulated in the “difference principle”, is one of the central pillars of Rawlsian justice. It posits that social and economic inequalities can be deemed just as long as they yield compensatory benefits for everyone, particularly the least advantaged members. This idea transcends a simplistic condemnation of all inequalities, recognizing that some disparities may fulfill a

broader social function. To further illuminate his perspective, Rawls conceived the “original position” and the “veil of ignorance” (ibid.). By imagining a hypothetical scenario where individuals lack knowledge of their social status, talents, or abilities, Rawls asserts that rational individuals would settle on principles of justice that safeguard the interests of the least privileged (ibid.). This thought experiment emphasizes the moral imperative to consider inequalities within a framework of overall societal benefit.

However, we must remember not to conflate justice with equality. Equality’s rigid application can obscure individual distinctions in merit, effort, and entitlement. For instance, awarding identical grades in an academic setting undermines individual endeavors. It also further overlooks distinctions in students’ diligence and excellence. The principle of desert advocates unequal treatment as a requisite for justice in its emphasis on proportional rewards or penalties relative to actions and contributions. Such disparities can serve as societal incentives, fostering industriousness, productivity, and innovation. From an economic vantage point, inequality might fuel competition and creativity. This engenders a form of societal progression. Differential rewards for disparate efforts can also act as stimuli for economic flourishing. Dishing out inequality, however, demands careful modulation as individual recognition must be balanced with broader societal coherence. Striking an equilibrium that honors individual merit without subverting social unity is a complex challenge. Excessive disparities may provoke social disintegration, which can erode communal trust. Thus, as critics caution, viewing inequality solely as a positive dynamic risks overlooking entrenched injustices or biases.

Theoretical Insights into Inequality and Justice:

Bridging Abstract Constructs with Empirical Realities

Inequality, by its very nature, denotes disparities in resources, opportunities, or status among diverse entities. It is inherently comparative. It requires juxtaposition between

varied conditions, which makes inequality contextually dependent. As a relative construct, it demands reference points to delineate superior or inferior positions. As these references fluctuate across cultural landscapes, societal norms, and individual interpretations, they infuse complexity into inequality assessment. For example, the disparities in the living conditions between a rural Filipino village, a European urban center, and an indigenous tribal community highlight the relativity and context dependency of inequality. In economic discourse, metrics of income or wealth hinge on particular societal frameworks. What constitutes an imbalance in one milieu might not translate into another. Likewise, social inequalities, including disparities based on gender, race, or education, exhibit comparative attributes. As discussed earlier, these perceptions fluctuate with cultural norms, societal values, and historical contexts. In this volume, we provide the following theoretical analyses to glimpse this fertile and complex field.

Building upon the idea of inequality as a multidimensional phenomenon, *M. Onur Arun* follows a path exploring justice in a way that recognizes its multi-dimensional characteristic involving various dimensions such as distributional actions, procedural rules, retributive regulations, and restorative arrangements. These four dimensions of justice are usually addressed as broad forms of justice in the existing literature (see Sabbagh and Schmitt, 2016) and illustrate the complex nature of justice. However, Arun's contribution to this volume is distinguished from the existing classifications of justice. He underlines the intersectional nature of diverse forms of justice theories and attempts to address how these forms of justice may complement and connect. In addition to this, Arun also attempts to distinguish forms of justice and subject areas of justice from each other. To illustrate the distinction between forms of justice and subject areas of justice, he involves two contemporary subject areas in justice studies, namely organizational justice (see Greenberg, 1987; Colquitt et al., 2005) and transitional justice (see Fischer, 2011; Webber, 2012), in

conjunction with its historical and philosophical roots. Arun then offers a nuanced exploration that challenges reductionist approaches and recognizes the evolving and expanding field of justice studies.

Shifting the focus from a broader concept of justice to a more particular concept of social justice, *Abdullah Said Ari* provides a critique of John Rawls's theory, probing its treatment of structural inequalities and its foundational concepts. While recognizing Rawls's influence in re-centering social justice within political philosophy, Ari's chapter raises substantial concerns about the theory's alignment with the liberal-capitalist paradigm, its operational viability, and its generalizability. By questioning the legitimacy and practicality of Rawls's approach, the chapter illuminates inherent challenges and limitations in constructing a universal theory of justice within the confines of existing social structures. It concludes by positioning Rawls's works (e.g., 1993 and 1999) as an important but imperfect attempt to navigate the intricate landscape of social justice.

Continuing the exploration of philosophical underpinnings, *Necdet Yıldız* offers a nuanced examination of Nietzsche's perspectivism by highlighting its potential to foster epistemological equality and connect to the broader themes of inequality and democracy. Engaging with Nietzsche's ideas that consider knowledge "as a tool for power" (Nietzsche, 1968) and Foucault's work that performs "a historical analysis of scientific discourse" (Foucault, 2005), Yıldız navigates complex philosophical terrain to argue for the potential of perspectivism in fostering epistemological equality. The chapter opens new pathways for understanding inequality and democracy and offers insights into the inherent paradoxes of knowledge and interpretation within the framework of perspectivism.

Building on the complexities of inequality and justice, *Benjamin Kerst's* exploration of perceived injustice and *Alem Kebede's* analysis of social inequality in the United States offer theoretical pieces with an empirical bent. These works

illuminate the multifaceted nature of inequality by grounding abstract theoretical constructs in real-world contexts and providing a richer and more nuanced understanding. Kerst provides a robust theoretical exploration of injustice and inequality, grounded in concepts such as “perceived inequality” (see Franc and Pavlović, 2021), “relative deprivation” (see Smith et al., 2012), and “perceived injustice”. By focusing on the articulation of grievances among young members of German marksmen’s clubs, Kerst constructs a theoretical framework that encompasses the intricate relationship between subjective perceptions and radicalization. The theoretical constructs are not merely abstract; they are empirically substantiated through qualitative interviews. This dual accent on theoretical exploration and empirical validation makes the chapter a nuanced contribution to the literature on injustice, inequality, and radicalization. Kebede’s chapter on social inequality in the United States similarly integrates theoretical insights with empirical research. Grounded in Bourdieu’s generative structuralism (see Bourdieu and Wacquant, 1992), the chapter transcends a narrow economic perspective, embracing a broader cognizance of social stratification through the lens of cultural capital. Kebede’s theoretical exploration probes the intricate dynamics of social inequalities, particularly within the American educational system, and offers a rich analysis that serves both as a theoretical exploration and a practical guide for scholars, policymakers, and educators.

Inequality and Difference: A Subtle Exploration in Modern Stratified Societies

In modern liberal societies, two terms often resonate in political, social, and academic discussions: “inequality” and “difference”. Though sometimes used interchangeably, they form two separate branches of a complex tree. Differences symbolize the manifold variations among individuals or groups, spanning qualities like sex, race, political ideology, age, and so forth. Taylor’s politics of recognition emphasizes that in liberal societies, such differences are more than

mere deviations. They are hallmarks of a pluralistic life. Taylor warns that failing to recognize these differences can lead to marginalization and misrecognition, while merely celebrating them without redressing inequalities can result in superficial multiculturalism (Taylor, 1992). These variations shape our collective existence. They contribute to fostering creativity, innovation, and cultural richness. In these terms, inequality signifies the uneven distribution of opportunities and benefits that arise without justification for differences. Young's critique of traditional models of justice illuminates that this imbalance transcends mere variation. Young (1990) argues that justice must include both recognizing and valuing differences as well as eliminating institutional barriers that prevent various forms of participation in social life.

When differences become conduits for disparities in access to resources, prospects, opportunities, or rights, they metamorphose into inequalities. For instance, sex differences are natural facets of human diversity. When these differences morph into disparities in pay, opportunities, or treatment, they become agents of inequality. Hence, the gender pay gap or unequal opportunities in professional advancements. Similarly, racial and ethnic differences can add depth and enrich a country's cultural milieu. However, these variances become problematic when they translate into discrimination, impediments, or unequal access to vital societal goods. We see these manifest in the domains of education, healthcare, or employment. An example can be seen in racial or ethnic minorities facing barriers in education or healthcare services related to systemic disparities. This transformation from difference to inequality is not merely coincidental. It is often fueled by systemic biases, prejudices, or discriminatory practices. The underlying mechanisms can include both overt discrimination and more subtle biases that permeate societal norms, institutions, and policies.

Moreover, in the modern stratified societies of our time, the discourse surrounding inequality and difference is often complex. These terms are interrelated but not synonymous.

They represent two axes, horizontal and vertical, that intersect and interact in different ways. One of the pressing intentions of this book is to dissect these concepts and uncover their interplay, as well as explore their implications within the contemporary sociopolitical landscape. Difference embodies the horizontal aspect of human diversity. In an ideal liberal society, these differences are not merely tolerated; they are embraced and celebrated.

From a horizontal perspective, differences stand side by side, free from hierarchy. It embodies the democratic ideals of equality and respect, allowing multiple perspectives to flourish without implying superiority or inferiority. In contrast, inequality introduces a vertical dimension to human relations. It encompasses unjustifiable disparities in access to resources, opportunities, or rights that stem from differences. These divergences create a hierarchical arrangement where some individuals or groups are situated above others. This vertical nature creates a tiered structure that leads to imbalances in power, status, and opportunity. For example, gender differences can be viewed as horizontal variations that enrich human diversity. However, when these differences manifest in disparities in pay or opportunities, they ascend to vertical inequalities, erecting a hierarchical divide. Similarly, cultural diversity represents horizontal differences that add vibrancy to society. Economic inequalities can introduce vertical divisions to this that then create imbalances in wealth and opportunity. The interplay between horizontal differences and vertical inequalities is understandably complex and demands further attention that is beyond the scope of this chapter. Furthermore, classification between horizontal and vertical inequalities can take quite different forms due to the difficulty in identifying them.

Building upon the motifs of vertical and horizontal dimensions, *Ibrahim Kuran's* scrutiny of Universal Basic Income (UBI) adds a further layer to our understanding of social inequalities. Defined as an unconditional income for all citizens, UBI emerges as a contested political project, reflecting

a spectrum of perspectives from rightist (see Murray, 2016) to socialist feminist ideologies (see Weeks, 2020). In his analysis, Kuran classifies various UBI models and connects them with theoretical constructions of justice. The dialectical dynamics he introduces between capitalist and anti-capitalist interpretations culminate in a call for a progressive UBI that supports the working class and mitigates inequality. Kuran's exploration echoes the intricacies of the horizontal differences and vertical inequalities we discussed earlier in this chapter. By engaging with the potential immediate benefits and future transformations of UBI, Kuran's chapter further emphasizes the tension and potential alignment between economic efficiency and social welfare.

In this light, *Kent E. Henderson's* chapter transitions the discussion to environmental inequality and justice in the U.S., tracing its roots to the seminal Warren County incident in 1978. This incident, involving the illegal dumping of toxic waste in a predominantly African American county, may have served to catalyze activism and academic research leading to the emergence of concepts such as "environmental racism" and "environmental inequality" (Holifield, 2001; Bullard, 1993). Reflecting on the growth of environmental inequality studies, Henderson emphasizes the interconnectedness of environmental issues with broader social disparities, juridical frameworks, and human life. Henderson's overview contributes valuable observations to our understanding of social injustices and the transformative power of activism. This approach highlights the complexity of environmental inequality in the context of vertical imbalances.

In considering Chile's socio-economic dynamics after 1973, *Alejandro Marambio-Tapia* centers his analysis on the relationship between credit practices and perceptions of social mobility and inequality. His exploration of vertical inequality deepens our understanding of credit expansion, which despite fostering a sense of agency among lower and middle-income groups, disguises the true extent of inequality. Marambio-Tapia highlights the rise of consumer culture in

the 1980s and 1990s in Chile and contrasts it with persistent income disparities, as evidenced by the country's high Gini coefficient. His analysis clarifies how the state's retrenchment led to the financialization of essential needs and an alarming rise in the income-debt ratio and growing dependence on credit. The chapter further explores how the privatization of welfare and deregulated credit markets have exacerbated inequality, which has disproportionately benefited the upper echelons of society. Critically assessing how the democratization of credit has shaped a "middle-class consciousness" (see Marambio-Tapia, 2021 and 2023; Pérez-Roa, 2021; Pérez-Roa and Troncoso-Pérez, 2019), Marambio-Tapia illustrates how this has blurred class distinctions and created a perception of a less unequal society, despite the underlying class precariousness that still existed. This nuanced exploration resonates with the broader thread of justice and inequality, offering an angle into the multilayered nature of social stratification.

A case study by *Matthias Meißner, Julia Seefeld, and Silke Tophoven* explores vertical differences in the context of rehabilitation and social justice for people with disabilities in Germany. The authors dive into the complexities of the German rehabilitation system, which they argue offers support measures but also presents barriers due to its intricate structure (Deck et al., 2022; Nivorozhkin et al., 2018; Nivorozhkin et al., 2018; Sellach et al., 2006). Their examination highlights the significant disability employment gap and emphasizes the economic imperative of investing in rehabilitation. Regarding societal welfare and resource allocation, the authors find alignment with the broader theme of vertical inequalities, enriching our perspective on these issues. By critically assessing legal provisions, implementation hurdles, specific challenges for diverse groups, and the potential of digitization, they provide us with a view of the systemic disparities and inequalities that shape the experiences of people with disabilities.

Insights from Empirical Studies

It is noteworthy that while some studies pivot on either horizontal differences or vertical inequalities, classifying them is not always straightforward. Some research, more so than others, touches upon both dimensions either explicitly or implicitly, hence, adding layers of complexity to the subject matter.

Wai Lau and Deborah Giustini's work on the “clash of habitus” during the COVID-19 pandemic offers a vivid illustration of horizontal differences but also implicitly explores vertical aspects in the British context. They examine the tensions and adaptations in daily habits in response to government-imposed lockdown measures. Using the sociological perspectives of Pierre Bourdieu and primarily Norbert Elias, their chapter explores the “civilizing offensives” (see van Krieken, 1999; Powell, 2013; Mennell, 2015) in referring to the direct governmental interventions that shaped everyday conduct during the pandemic. While these offensives might appear to affect populations in a non-hierarchical manner, Lau and Giustini argue that reality is more complex. The government's ability to impose and enforce these norms introduced a hierarchical dimension, and the effects on different populations were varied, consequently laying bare the underlying social, economic, and cultural hierarchies. This study provides a good view of the interplay between horizontal differences and vertical inequalities, underscoring the relationship between governmental authority, societal norms, and individual behaviors.

In exploring the frictions and ambiguities faced by irregular migrants in the United States, *Jonathan Leif Basilio's* chapter unpacks the paradoxes embedded in its taxation system. He notes that the migrants not only contribute significantly to national tax revenue but also find themselves legally invisible, precluding them from gaining the full array of public benefits and social safety nets that their tax dollars support. Basilio further argues that their pursuit of regularization or legal status, characterized by “citizen-like” behavior while navigating

the shadows of “illegality”, may seem to be within reach but is often challenging or even impossible to achieve (Chauvin and Garcés-Mascareñas, 2014; Menjívar and Abrego, 2012). Basilio examines the vertical inequalities that shape the experiences of this marginalized community, which he frames within the context of the regulation process and “taxation circuits”, defining these as the specific networks and systems governed by individual and social norms and values through which immigrants contribute to national tax revenue. Additionally, we can observe the horizontal dimensions of taxation as he reflects on the tensions between immigration status and social interdependencies in the context of the migrants’ relationships with other institutional actors, their employers, and members of their familial networks.

These empirical studies collectively enhance our understanding of the multifaceted nature of inequality and difference within modern stratified societies. By engaging with both vertical and horizontal dimensions and recognizing the intricate challenges embedded in classification efforts, these works offer observations and reflections that resonate with both academic discourse and practical endeavors to foster fairness in a globally connected society.

Conclusion

Embarking on *A Quest for Justice: Theoretical Insights, Challenges, and Pathways Forward* involves inquiring about the notions of justice and its connotations and implications. This volume includes contributions from sociologists, political scientists, social policy, and social work scholars from countries such as the United States, Turkey, the United Kingdom, Belgium, Germany, and Chile. Challenging simplistic interpretations of our subject matter, our collective objective has been to offer viewpoints that engage with the real-world complexities of an interconnected globe and that melds theory and practice through critical examination. A standout vision in the volume is the examination of the transition from difference to inequality within modern societies. By dissecting the

subtle mechanisms that transform variations into disparities, this volume emphasizes the importance of recognizing and celebrating differences without allowing them to evolve into agents of inequality. The harmonious integration of theoretical insights with empirical research shows the contextual nature of inequality as well as the multidimensional aspects of justice. Our engagement with some of the foundational theories in the literature also has led us to acknowledge the inherent obstacles in constructing a universal theory of justice, a theme that is resonant throughout the work we present here. We also propose an approach to navigate the complexities of justice and inequality that, importantly, stresses adaptability and readiness to grapple with paradoxes. Some of these include examining moral conflicts or dilemmas, carefully weighing between individual rights and the collective good, and interweaving ethical obligations imperatives with pragmatic realities. These serve to enrich our comprehension of the subject matter.

This volume aspires to resonate beyond academic discourse. By bringing together theoretical insights and empirical realities from a globally diverse set of contributors, we sought to offer our readers not only a richer understanding of justice and inequality but also lays a foundational framework for pathways forward in terms of critical engagement, societal discourse, and policy deliberations. As readers turn the pages, they are invited to engage with these themes as dynamic manifestations of human society, demanding continuous reflection and thoughtful action. This is not just an academic exercise; it is a genuine quest for justice that resonates with the complex realities of our interconnected world.

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Forms and Scopes of Justice: An Intersectional Taxonomy

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Introduction

In the very early stage of editing this book, my aim was to articulate a particular idea of justice advocating that the unequal social processes individuals have navigated in demonstrating meritorious and successful achievements require our modern societies to reward these individuals unevenly. Aspiring to focus on (pre)occupational life experiences of academics in Türkiye, my objective was twofold: (1) exploring varied social processes that disadvantaged and privileged academics in Türkiye have passed through and (2) examining the unequal social costs they have incurred in their journey of being a member of a respected occupation. This research interest, cultivated over recent years, was principally inspired by what I had witnessed of privileged academics who, with a certain arrogance yet implicitly, accentuated their excellence in their occupational lives, even though this was irrelevant to the subject of the ongoing conversation. My interest was further reinforced when I purposively listened to the life stories of disadvantaged academics who had to deal with class-based constraints while concurrently competing with privileged colleagues who naively attributed their success solely to hard work, intelligence, and innate abilities. Through both unstructured observations and casual conversations with

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academics from varied sociological and economic strata, a normative political thought has emerged. This thought suggests that unequal (im)material rewards within identical occupational statuses may, at times, manifest as a moral requirement for just distribution.

While carving out this particular normative perspective and reflecting on diverse empirical cases of academics in Türkiye, Jonathan, the co-editor of this book and one of my closest friends, voiced a critical view, claiming that scholars of distributive justice, including me, have tended to make use of the concept of justice interchangeably with that of social or distributive justice, even though the concept itself is more comprehensive than what is known as either social or distributive justice. This criticism, to a significant extent, was valid and addressed the problem of conceptual reductionism. Here, a comprehensive concept, namely justice, is used by most of us to refer to a particular family of theories that primarily aim to propose and advocate certain normative principles and criteria for value distribution within a political community. On the one hand, such an interchangeable use of the concepts of justice and social or distributive justice can be rationalized by not only the centrality of distributive theories in the literature of justice but also the shared terminological preferences of the most influential philosophers in the existing literature on social or distributive justice. However, the existence of such criticism can also be considered as an explicit need for a terminological clarification within the broad literature of justice. In fact, this need is observably apparent for those who have been studying, teaching, and writing about competing and contending perspectives of social, or distributive, justice with the aim of developing just social and economic public policies.

In this regard, departing from the problem of terminological reductionism mentioned above and motivated by the need to move beyond mainstream theories of social or distributive justice, this chapter, in essence, focuses on providing a non-exhausting classification of theories of justice in a

way that aims to underline their distinctive characteristics. Below, within the limited space of this work, I follow a way which is also followed by some other academics (see Sabbagh and Schmitt, 2016) and aim to provide a taxonomy, or a classification, of different forms of justice involving distributive justice, procedural justice, retributive justice, and restorative justice. In doing so, however, I also attempt to provide this taxonomy in a way that does not only illustrate distinctions of these forms of justice but demonstrate their intersectional nature as well. Emphasizing this intersectionality that illustrates collaborating natures of these broad families of justice theories is especially important since considering these theories in a way detached from each other can potentially cause a significant misunderstanding of their potential as well as their comprehensive analytical textures. Although these four forms of justice can be considered the primary typologies under which almost all existing theories of a just society can be classified, this chapter also provides a discussion and identification of two subject areas of contemporary justice studies, namely organisational justice and transitional justice. There are two reasons to include these areas, even though they are not distinctive forms of justice theories but more subject areas within the broad literature of justice. The first reason is obviously associated with the fact that these subjects and the issues they focus on (along with some other subject areas, such as environmental justice and gender justice) have attracted considerable attention from scholars of social sciences over the last few decades, making it worthwhile to include them in this chapter. However, more importantly, involving these two subjects, namely organisational justice and transitional justice, may help readers to distinguish different forms of justice theories and subjects of justice studies.

Distributive Justice: Answering the Questions of “Who Should Get What?” and “Why?”

Distributive theories occupy the most central place in the broad literature of justice and are sometimes identified as

theories of social justice. Elsewhere, I identified these theories as the normative perspectives seeking the most adequate answers to the questions of “who gets what” and “how much” (Arun, 2018: 231). Even though this definition to a large extent captured the most common core characteristic of theories of distributive justice, it lacked to underline a distinguishing characteristic of these theories, all of which, one way or another, involve a reasoned or reason-based argumentation. This is to say that distributive theories of justice are, in essence, concerned with value allocation in a political community; yet, they also substantially engage in developing a moral justification, or ethical reasoning, supporting their answers to the question of “who gets what”. Therefore, revising the first definition above a few years later, I reidentified distributive theories of justice as normative perspectives that attempt to find out answers to the questions of “who should get what” and “why” (Arun, 2022: 1019) both of which refer to normative and argumentative characteristics of distributive theories.

Among others, a misconception about distributive theories of justice is that they are only concerned with the just allocation of or desired values, including, but not limited to, wealth, resources, rights, opportunities, income, positions of power, respect, recognition, admiration, and so forth. Yet, the allocation of these desired values is only a part of distributive theories of justice. Even though it is not quite straightforwardly observed, most of these theories also involve normative arguments, or claims, concerning who should get undesired outcomes which are sometimes identified as evils such as poverty. To illustrate, desert-centred theories are not only concerned with a person’s benefits (e.g., advantages) in return for, say, her/his hard work, but also individuals’ burdens (e.g., disadvantages) in return for, say, laziness or idleness (Kristjansson, 2003: 41, see also Miller, 1999: 10-11). Similarly, theories of distributive justice that are primarily based on individual responsibility, such as luck egalitarianism (see Dworkin, 1981a and 1981b; Barry, 2006 and 2008), are also

not only concerned with how to regulate people's gains but also deal with how people's loss should be arranged in a just society. Another commonly observable misconception about these theories is that not all distributive theories of justice seek absolute equality. Still, most of them illustrate a quality that is aiming to identify under which conditions inequalities are morally just (Arun, 2022: 1019). To illustrate, according to the second principle of justice as fairness proposed by Rawls, who is consensually addressed as one of the most influential figures of social justice in our era, social and economic inequalities are arranged in a way through which the least advantaged members of society benefit in the greatest way (Rawls, 1971: 83; see also Rawls, 1985: 227). Similarly, Nozick, who is known as the leading scholar of the libertarian model of distributive justice, justifies inequality in individuals' earnings based upon a well-known hypothetical example referring to the earnings of Wilt Chamberlain (see Nozick, 1974 [2013]: 158-161).

One of the crucial issues about theories of distributive justice is the distinction between what we can call the space of evaluation and the object of evaluation (see also Basilio and Arun, 2022: 933). This distinction is often blurred in scholarly works, particularly in empirical ones, when researchers and scholars empirically and/or theoretically discuss the virtues and drawbacks of existing theories of distributive justice. Space of evaluation can be considered the primary criteria based on which the justness of an action, a policy, or a decision is evaluated. These criteria can be considered the most crystallised characteristic of the normative perspectives of distributive theories of justice, which means that they reflect the most distinctive nature of distributive theories of justice. To illustrate, one theory of distributive justice (e.g., Rawlsian theory of social justice) advocates fairness as the space of evaluation when a particular policy, institutional regulation, law, or legal arrangement is evaluated in terms of that if this policy, regulation, or legal arrangement is formed based on the overarching criterion of fairness. Similarly, liberal

theories of distributive justice are usually known as normative perspectives whose primary criteria of distributive justice are merit and/or desert. Apart from these, there are some other perspectives in the literature on distributive theories of justice that suggest evaluating the justness of an action, policy, or regulation based on people's capability, utility, or the ideal of equality. On the other hand, the object of evaluation is something different from the space of evaluation. It refers to the object that is aimed to be distributed, such as wealth and income, social primary goods, opportunities, or various forms of resources. To illustrate this, the Rawlsian model of social justice suggests the distribution of social primary goods in line with principles of fairness; or the libertarian perspectives of distributive justice advocate allocations of wealth, income, and positions of power in line with the criterion of desert and individual's merit whilst egalitarian views of social justice, broadly speaking, take equality as the space of evaluation and seeks to distributive various forms of opportunities, resources or rights as the space of object. Obviously, there are variations and also intersectionality not only among these theories of social justice but also within these theories themselves, which can sometimes lead to confusion for researchers when they aim to apply these normative theories to evaluate a particular case, a social or economic arrangement, or a policy proposal. Yet, it should be kept in mind that the distinction between the space of evaluation and the object evaluation is quite important in terms of understanding virtues, differences, and qualities of theories of distributive justice as well as their contending and competing proposals.

Procedural Justice: Answering the Question of “How to Distribute?”

The focal point of theories of procedural justice is about arriving at the just distribution of (un)desired outcomes through a just process. In its broadest definition, procedural justice, which is sometimes addressed as “procedural fairness”, refers to “how an allocation is made” (Konovsky,

2000: 492). In this regard, theories of procedural justice are more interested in the question of “how to distribute” goods and evils (in other words, desired and undesired outcomes), whilst distributive theories of justice, as I explained above, more often focus upon the question of who should get what. On the other hand, such descriptions of both distributive and procedural theories of justice should be accompanied by a further commentary emphasizing the inseparable relationship between just procedures and just outcomes. This is to say that, especially for some theories of distributive justice, the just distribution of (un)desired outcomes inherently depends upon the just process of distribution, which demonstrates the intersectional natures of procedural and distributive theories of justice.

The best illustration of such intersectionality is the well-discussed theory, or political idea, of the equality of opportunity that can be considered as a liberal-egalitarian perspective against kinship-based favouritism as well as political nepotism in the distribution of wealth, opportunities, and positions of power. As a widely acknowledged political idea against the equal distribution of (un)desired outcomes, the equality of opportunity advocates that any form of discrimination based on gender, ethnicity, age, political ideal, or social class is irrelevant. According to it, everyone should be given an equal chance to be part of a competitive process at the end of which rewards are given to the most meritorious one. In this regard, rewards or valued opportunities should be unequally allocated among those given an equal chance to participate in the competitive process. Here, we observe that the equality of opportunity justifies inequalities in the distribution of valued outcomes based on the initial equality provided to everyone without any arbitrary form of discrimination in participating in the competitive process for valued outcomes. Thus, it can be signified as a process-oriented idea of just distribution whose moral justification is underpinned

with references to the process prior to the competition taking its place.

However, it should be underlined that apart from the distributive questions, procedural justice especially matters in the domains of legal and organisational arrangements. Considering that the “effectiveness of law and legal decisions is heavily dependent on widespread voluntary compliance with their directiveness by those who are affected by those decrees” (Tyler and Lind, 2001: 66), any legal system cannot be sustained without people’s trust to the fairness of procedures through which the legal and public authority makes decisions. This is primarily because a person’s compliance with rules is strictly associated with her/his belief or perception concerning that these rules and directives are fair. This is the reason why most of the broad literature on procedural justice is unevenly made of research and discussions conducted and sustained in the fields of psychology and social psychology, and it extensively focuses on perceptions of people. Obviously, people’s perception concerning the fairness of legal regulations and institutional arrangements is a significant matter in terms of maintaining the social, economic, political, and institutional order, which addresses the instrumental role and value of procedural justice in ensuring the continuity of a stable social system. However, beyond this, there is another instrumental reason behind the significance of procedural justice that people’s perception concerning the fairness of decision-making procedures may lead them to accept allocations of not only rewards and penalties but also duties and burdens (Vermunt and Steensma, 2016: 219). People’s perceptions concerning the fairness of the decision-making process can be influenced by various factors associated with the history of their community to which they are attached, norms of society where they live, modes of economic relations based on which they make their living, nature of political arrangements that arrange their living conditions, and so forth. In this regard, it is difficult to arrive at universal standards of fair procedures. On the other hand, there are certain standards

that should not be overlooked to ensure fairness in the decision-making process. Leventhal identifies six criteria “which allocative procedures must often satisfy to be perceived as fair” (1980: 39) and addresses these as (1) the consistency rule implying that “allocative process should be consistent across persons and over time”, (2) the bias-suppression rule implying that both “personal self-interests and blind allegiance to narrow preconception” should not be allowed to intervene the process of distribution, (3) the accuracy rule implying the necessity “to base the allocative process on as much good information and informed opinion as possible”, (4) the correctability rule implying that “opportunities must exist to modify and reverse decisions made at various points in the allocative process”, (5) the representativeness rule implying that “all phases of the allocative process must reflect the basic concerns, values, and outlook of important subgroups in the population of individuals affected by the allocative process”, and lastly (6) the ethicality rule implying that “allocative procedures must be compatible with fundamental moral and ethical values accepted by that individual” (*ibid.*, 39-46). Even though these rules may not be sufficient to signify all procedures of decision-making as the just one, they can be considered as standards that are, to a large extent, necessary for establishing a just procedure.

Briefly saying, even though it may instrumentally be useful to distinguish procedural justice from distributive justice with the purpose of conceptual explanations as well as clarifications, they are not fully distinguishable from each other since just outcomes most of the time depends upon just processes. In other words, neither just outcomes nor just processes are sufficient to ensure justice in a political community on their own. In fact, there is practical value in considering both procedural and distributive justice together, which is why the greatest theories of justice that we have today do not only explain who should get what but identify how to decide who should get what as well.

Retributive Justice: Justice through Punishment

It would not be wrong to claim that disorder has always been one of the core issues that social and political scientists, one way or another, have been occupied with since the early classical period of political philosophy. No doubt, there are quite a number of distinctive reasons behind such broad interests of social and political scientists towards the significance of stability and order in their social and political milieus. However, for scholars of justice, stability, and order are particularly important since they are perceived as immaterial hallmarks of a just society. Beyond this, both stability and order are also considered among fundamental prerequisites for both establishing and maintaining a just and well-ordered society. This indeed has always been very obvious since Thomas Hobbes published his masterpiece titled *Leviathan or the Matter, Forme and Power of a Commonwealth Ecclesiastical and Civil* (2004 [1651]), which can be pointed out as one of the most important classical works of the social contract theory and the legitimate government. Despite the fact that there are a number of diverse views on order as well as how it can be ensured in a political community (see Heywood, 2004: 163-169), it is not a surprise that punishment of wrongdoers appears as an inseparable aspect of ensuring the order without which establishment of a just society is inevitably jeopardized.

As addressed above, distributive justice is primarily concerned with the question of “who should get what,” whilst procedural justice, to a large extent, focuses upon the question of “how”. These questions, as also discussed above, are aimed to be responded to by different normative theories of justice with the purpose of allocating desired and undesired values, in other words, goods and evils. This is to say that arriving at a just society does not only require a just allocation of desired values/outcomes (or, goods) but also a just allocation of undesired values/outcomes (or, evils). Allocation of undesired values/outcomes, or evils, can be considered as a form of punishment of wrongdoers with the purpose of

establishing an ordered community where stability and social harmony are ensured. However, any form of punishment, or distribution of evils, should not take an arbitrary form, which means that punishments ought to be justified, fair, impartial, and regulated. It is this point where a particular form of justice which is known as “retributive justice” appears as a distinct family of justice theories.

Broadly speaking, this family of justice theories in essence focuses to enlighten the questions of “who should be punished”, “why”, “how”, and “to what extent”. It is an area of justice studies; and it plays a philosophical role in deciding the formation and application of regulations based on which criminal justice systems work. In this regard, retributive justice can be considered a sub-area of justice studies that determine how institutions and officials in the criminal system should decide and act. Retributive justice and some of its subjects are still contested, as noted by Walen (2020), who also addresses three principles that retributive justice is committed to. According to Walen, these principles upon which retributive justice is built are that (1) “those who commit certain kinds of wrongful acts, paradigmatically serious crimes, morally deserve to suffer a proportionate punishment”, (2) “it is intrinsically morally good -good without reference to any other goods that might arise- if some legitimate punisher gives them the punishment they deserve”, and lastly (3) “it is morally impermissible intentionally to punish the innocent or to inflict disproportionately large punishments on wrongdoers” (ibid.). Here, four distinctive traits of retributive justice appear as moral good of punishment of a wrongdoer in line with desert, (dis)proportionality, punishment by a legitimate authority, and moral obligation to avoid the punishment of innocent ones. However, Wenzel and Okimoto provide a more straightforward definition of retributive justice. They suggest it “refers to the subjectively appropriate punishment of individuals or groups who have violated rules, laws, or norms and, thus, are perceived to have committed a wrongdoing, offence, or transgression” (Wenzel and Okimoto,

2016: 238). In line with these views, it should be clear to us that retributive justice is primarily concerned with the justification of punishment; in other words, its central subject is concerned with the question asking what philosophical and moral underpinnings should determine/inform type and extent of punishment that is expected to be imposed upon the wrongdoer or transgressor. Broadly speaking, there are three competing perspectives responding this question as follows: retribution, deterrence, and rehabilitation or reform (see Heywood, 2004: 170-172). Before discussing these competing perspectives, however, we should be aware of the chief distinction of retributive theories. Retributive theories of justice are by their nature “backward-looking” theories “focusing on the moral duty to punish past wrongdoing” (Cahill, 2007: 818); yet, procedural and distributive theories of justice are more of normative proposals concerning how allocation should be arranged, which demonstrates that they are present and future-looking theories.

The first competing perspective, namely retribution-based justification of punishment, is the oldest one whose roots lie in the religious conception of sin and evil (Heywood, 2004: 170). According to this view, wrongdoing is evaluated to decide what transgressor deserves in return for her/his wrongdoing since punishment itself is seen as a “just desert” through which the moral fabric, or structure, of the society, is strengthened (*ibid.*). The underlying logic in justification of punishment from the retributive perspective is that punishment should be appropriate for the crime, which means that punishment should take a form that is comparably equivalent to the crime that the transgressor conducted. The roots of this view that suggests “the punishment should fit the crime” can be found in monotheistic religions where “an eye for an eye or a tooth for a tooth” is the most adequate form of the proportional punishment view (*ibid.*). However, the second competing perspective, which is the deterrence-based justification of punishment, advocates the idea that not only punishment itself but also the extent of punishment ought

to aim to prevent the emergence of the crime in the future. In other words, both punishment and its extent should primarily aim to stop crime and criminal activities before they appear. In this regard, deterrence-based justification focuses to create a social atmosphere in which potential offenders avoid engaging in criminal activities by looking at the how wrongdoers were punished in past. This accordingly means that deterrence-based punishment creates public stories of punishment in a way that re-engaging in the wrongful acts and crimes becomes less attractive for members of the community (Wenzel and Okimoto, 2016: 241-242). In this regard, deterrence-based punishment advocates that “punishment selected should have the capacity to deter other potential wrongdoers” and, based on this aim, it “may at times justify far stricter and even crueller punishments than retribution ever can” (Heywood, 2004: 171). The third competing perspective is rehabilitation-based punishment of wrongful acts and crimes.

This perspectives toward punishment perceive wrongdoing as an act whose roots lie in the basic structure of society and, thus, it alters retributive and deterrence-based perspectives of wrongdoing from consequentialist understanding to constructivist understanding (Wenzel and Okimoto, 2016: 242). As noted above, both retribution and deterrence suggest punishing wrongdoers and offenders as a consequence of their wrongful acts. Yet, the rehabilitation perspective toward transgressors does not have a conception of human beings who inherently tend to wrongful or criminal acts; instead it advocates that crime is a result of social, political, and economic structure and appears as a result of a particular configuration of these structures. In this regard, punishment of the criminal is not the ultimate solution for the re-appearing of the wrongdoing acts. Based on this, rehabilitation-based perspective suggests that prevention of crime is the societies’ responsibility (Heywood, 2004: 171), which means that simply punishing individuals who are engaged in wrongdoing acts may not be the adequate solution. Instead of this,

according to a rehabilitation-based perspective, a solution should be sought with the help of constructivist means aiming at “enabling the offender to lead a normal, crime-free life by building capacity and opportunities while also providing structures of support and risk management” (Wenzel and Okimoto, 2016: 242 quoted from Fortune, Ward and Willis, 2012).

Briefly saying, retributive justice can be seen as a particular form of justice that has recently started to re-gain popularity among scholars. Although it is originally rooted in social and political scientists’ quest for stability and order, it is today used in a variety of ways in criminology, regulations in law and legal systems, as well as economic and social arrangements in public welfare. This means that even though it is broadly known as a theory focusing on the form and extent of adequate punishment, its focus has enlarged to involve rehabilitation and reform practices with the contribution of structuralist views that suggest perceiving wrongdoing acts as faults of social, economic, and political structures of society. In this regard, such a particular understanding of retributive justice, which primarily perceives crime and wrongdoing act as a structural problem rather than an issue simply appearing in relation to individuals’ characteristics, intersects with another form of justice, namely restorative justice that has recently started to take remarkable attention.

Restorative Justice: Justice through Healing Practices

The concept of restorative justice is sometimes mistakenly confused with the concept of retributive justice. This is to a large extent because of that both of these concepts have homonymic structures; yet, unlike some particular forms of retributive justice (e.g., retributive punishment and deterrence-based punishment, which are broadly discussed above), it does not simply seek for punishment, but for correction through rehabilitation practices. This distinction between retributive justice and restorative justice is plainly

expressed by a leading figure of justice literature, namely Ronald L. Cohen, who says, “though the distinctions between the two may be less clear than it is sometimes assumed, it is clear that ‘retributive justice’ focuses primarily on the offender and just punishment he/she deserves, while ‘restorative justice’ focuses primarily on ‘restoring’ just relations among victim, offender and community” (Cohen, 2016: 257). Considering these definitions of both retributive justice and restorative justice of Cohen, one may claim that the punishment of the wrongdoing acts is not sufficient on its own to arrive at a just society that also requires us to develop actions and policies to heal victims of wrongful or criminal acts. Such a perspective of the just society calls for developing a conception in which both retribution practices (e.g., various forms of punishment according to the kinds of transgression) and restoration actions (e.g., various forms of healing practices according to the kinds of harm inflicted on victims) are considered as inseparable complementary aspects of each other.

Some scholars claim that restorative justice was a tradition in the criminal justice system in ancient times (see Braithwaite, 2002: 3; Van Ness, 2005: 2; Menkel-Meadow, 2007: 166) even though this view is challenged by some other scholars (see Daly, 2016: 10). Yet, it seems there is a consensus to a certain extent that restorative justice has started to gain its modern incarnation as a social practice and movement in 1970s (Menkel-Meadow, 2007: 163). Gaining its popularity in the years following the 1980s and 1990s, it underlined the need for a legal process in which victims of injustices deserve to have a more substantial role by claiming that the existing criminal justice system was incomplete with its exclusive focus on the offender(s), if s/he has violated the law and how to punish her/him, which eventually has left out the most affected party, namely victims (Van Ness, 2005: 2). Therefore, with the purpose of securing “restitution for victims, to provide them with support and assistance, and to give them a voice in the criminal justice process have underscored the injustice of a justice process that excludes victims from meaningful

participation” (ibid., quoted from Strang, 2002). Based on the idea that victims should be given a more substantial opportunity to voice injustices they were subject to and considering that this opportunity is a substantial way of healing injustices that victims, their families, and broader society experienced, restorative justice practices have started to gain more observable in the following years. In defining restorative justice, some scholars claim that restorative justice, as a justice practice, “cannot be defined, in part because individuals may choose to define it as they wish, and in part, because it is a complex and evolving concept” (Daly, 2016: 10). However, there are certain distinctive characteristics that help to understand the content and scope of the restorative justice. Among others, Clark underlines its “healing” characteristic and notes that the concept of restorative justice is originated in “the healing practices of aboriginal and First Nation people” and “used in variety of contexts involving both criminal matters (violations of criminal law) and civil matters (family welfare, child protection, disputes in the workplace)” (2008: 339). Yet, in both criminal and civil matters, restorative justice can take place with anticipation to develop norms, rules, and various forms of practices applied after the punishment stage, during which the transgressor or wrongdoer is lawfully penalised. In practice, healing in the restorative process is sometimes achieved in a way that those who have become victims of past wrongdoings/crimes and those who have been responsible for the wrongdoings/crimes are brought together under the supervision of a legitimate authority “to provide a setting for acknowledgement of fault by the offender, restitution of some sort to the victim, including both affective apologies and material exchanges or payments, and often new mutual understandings, forgiveness, and agreed-to new undertakings for improved behaviours” (Menkel-Meadow, 2007: 162).

Outcomes that the restorative process aims to achieve can appear in various forms. Among others, three forms of the outcome can be pointed out as apology, restitution, and

performing community service (Van Ness, 2005: 4). In the first form of outcome that the restorative justice process achieves, offenders or wrongdoers offer a sincere regret of their wrongful acts whilst the second form, namely restitution, the offender is expected to compensate the harm s/he has caused through financial payments or replacement of the victim's loss; and in the third form, offender perform a free service for the benefit of the community under the supervision of a charitable organisation or government agency (*ibid.*). In addition to the outcomes that the restorative process aims to achieve, dimensions of restoration are also important to specify. Although these dimensions are difficult to specify without having detailed information concerning particular cases of the conflict between victim(s) and offender(s), some scholars attempted to identify what to restore for justice from a particular normative framework, such as Braithwaite (2002: 12) who proposed quite broad eight dimensions as "property loss", "injury", "a sense of security", "dignity", "a sense of empowerment", "deliberative democracy", "harmony based on a feeling that justice has been done" and "social support".

Lastly, it is worth briefly mentioning about values that restorative justice should be based on. These values illustrate the distinctiveness of restorative justice from retributive justice; in other words, they illustrate how restorative justice differs from punitive systems and their legal regulations. There is no single value set upon which scholars of restorative justice have a consensus, which is, in fact, quite a similar problem to the question of the list in the literature of basic needs and poverty. This is to say that concerning the set of values that restorative justice should embrace, varied perspectives can be observed. However, we may expect from different sets of values that they embrace a ruling logic that "the underlying values of restorative justice promote a positive redemptions and ameliorative view of human behaviour, with a positive hope that even the worst among us can be transformed to consider the common good and the best for other human beings" (Menkel-Meadow, 2007: 170). Taking this perspective into

account, restorative values may, for example, include diverse values proposed by Braithwaite (2002: 14-15) as restoration of human dignity, restoration of property loss, restoration of injury to the person or health, restoration of damaged human relationships, restoration of communities, restoration of the environment, emotional restoration, restoration of freedom, restoration of compassion or caring, restoration of peace, restoration of empowerment or self-determination, and lastly, restoration of a sense of duty as a citizen.

Organizational Justice: Just Distribution and Just Process in the Workplace

Theories of organizational justice, in essence, do not compose a distinctive family of justice theories, but they are more of perspectives that focus on a particular subject in the broad literature of justice, similar to what is today known as gender justice or environmental justice. However, especially after increasing attention to just rewarding and fair treatment in one of the most prevalent areas of human activity, namely the working life, organisational justice has recently started to receive an ample interest from a broad range of disciplines in social sciences involving psychology, administrative and managerial sciences, sociology, labour economics, and political sciences; and this increasing attention and expanding literature on organisational justice led this chapter to involve it as an independent sub-heading.

Questions that represent the organisational justice theories' research focus can be addressed as "how do workers react to inequitable payments?", "how do workers attempt to create fair payments?", "how do workers react to unfair policies or legal procedures?", and "how do workers attempt to create fair policies or procedures" (Greenberg, 1987: 16). Organisational justice is in fact a sub-division of both distributive justice and procedural justice; yet it is a particular subject area that predominantly focuses upon just decisions and actions in working lives of individuals and organisations where they are employed. Organizational justice involves frequently

discussed issues in the realm of (1) distributive justice, such as pay, rewards, promotions and (2) procedural justice, such as fairness of the decision-making process at the end of which distributive outcomes appear (Colquitt et al., 2005: 5). In addition to this, organizational justice also draws on issues associated with what is known as the interactional justice that refers to the “nature of interpersonal treatment received from others” (ibid.). In this regard, according to Colquitt et al. (ibid.), organisational justice appears at the intersectionality of three different areas of justice studies involving distributive, procedural, and interpersonal treatments. A comprehensive and advanced taxonomy of theories within the subject area of organisational justice is presented under four categories as “reactive content theories”, “proactive content theories”, “reactive process theories”, and “proactive process theories” (Greenberg, 1987: 10-15), which focus on distributive and procedural issues. In this regard, considering that both distributive justice and procedural justice involve arrangements regulating both allocations of (im)material outcomes (e.g., income, titles, resources, respect, admiration, acknowledgement, and so forth) and process of decision-making (e.g., involving different voices, impartiality, neutrality, and so forth), it may be more accurate classification if organisational justice is considered as an exclusive subject area of justice studies appearing at the intersectionality of only distributive and procedural justice.

When studying and researching the subject area of organisational justice, one of the most important points to keep in mind is that employees’ perception of the just treatment in the workplace is not merely constrained by financial rewards, but it is more broadly associated with how people in organisations are treated by their peers and administrative authorities with regard to interpersonal relations and allocations of rewards. In this regard, even though financial promotions and rewards are undeniably important aspects of employees’ perception regarding fairness in their organisation, two more aspects can also be addressed as factors that are seminally

influential on employees' perception of fairness in their organisation. The first one is interpersonal justice which "refers to perception of respect in one's treatment" and the second one is informational justice which "refers to perception of whether an employer is providing timely and adequate information and explanation" (Yean and Yusof, 2016: 800).

Lastly, it should be noted that ensuring justice in organisations and increasing positive perceptions of employees that they are treated fairly involve the potential to augment employees' positive work attitudes such as job satisfaction, trust in management and leadership, and organisational commitment (see Choi, 2011: 186) whilst employees' perception regarding unfair treatment in the workplace may result with counterproductive work behaviour as well as withdrawal behaviour (Cohen-Charash and Spector, 2001: 287-288). Such empirical findings demonstrate that beyond the intrinsic value of justice on its own in all spheres of human activities, there is also a pragmatic, in other words instrumental, value behind maintaining justice in human organisations, which is a boldly underlined point by quite a number of research in the subject area of the organisational justice.

Transitional Justice: Aiming to Restore Large-Scale Historical Injustices

Transitional justice, similar to organizational justice, can be considered a subject area informed by a broad literature of justice studies rather than a particular form of justice like distributive justice or procedural justice. Transitional justice, however, is more related to forms of retributive justice and restorative justice but less associated with the other two major families of justice theories, namely distributive justice and procedural justice, since it particularly focuses upon objectives such as correcting legacies of large-scale past injustices emerged due to various forms of conflicts between social groups and communities in the forms of repressions, mass atrocities, violations of basic rights, as well as human rights abuses. Since the end of the Second World War, quite

a number of different truth commissions that have inquired about war crimes and human rights abuses in different countries have established and published their reports in line with some commonly appropriated values of restorative justice. The Nuremberg and Tokyo Trials (1945) to which the origin of the concept of transitional justice is usually linked by scholars, truth commissions established in Argentina (1983), Chile (1990), and Guatemala (1994), where crimes and violent human rights abuses by former authoritarian regimes were on trial, South African Truth and Reconciliation Commission (1995) where victims of apartheid regimes and mass human rights violations were given voices, can be addressed among well-known examples of legal trials and truth commissions that are frequently addressed in the literature of transitional justice.

Seeking justice for past injustices that occurred between or within social groups and communities is one of the major aims of transitional justice, whose goal is to ensure the prevention of re-emerging of these injustices and to pave the way for a new social contract between conflicting parties by creating an atmosphere in which lived experiences of repressions, oppressions, violations and abuses of certain social groups and communities are recognized through various social and legal means. In this regard, transitional justice, which has started to appear in the relevant literature and academic fields during the late 1980s and early 1990s, can be considered as a particular form of restorative justice practices that “emerge in the aftermath of macro-level conflicts to address the individual and collective harms they have produced, and in the context of state level transition” (Cohen, 2016: 265). Central questions in the transitional justice process can be addressed as “to what extent, and in accordance with what standards, is it appropriate to judge events that occurred under the former regime? What kind of processes, what forms of recovery or punishment, are appropriate in such circumstances?” (Webber, 2012: 98). Based on these questions, it can

also be seen that transitional justice is closer to the families of retributive justice with its inquiry on punishment and restorative justice with an inquiry on rehabilitation of victims.

In its early stages, transitional justice has been chiefly adopted and discussed by human rights movements and peace-building agencies; it has today turned into a field of inquiry and discussion that involves “establishment of tribunals, truth commissions, lustration of state administrations, settlement on reparations, and also political and societal initiatives devoted to fact-finding, reconciliations and culture of remembrance” (Fischer, 2011: 407). Accordingly, even though legal investigations are one of the most important parts of transitional justice, it moves beyond legal forms of inquiry to involve political and philosophical explorations of what has happened in the past and why they have happened. In line with this, transitional justice can be pointed out as a field of inquiry that “is concerned with various judicial and non-judicial approaches to dealing with” (Lundy and McGovern, 2008: 267) past abuses and violations of human rights that appeared during social conflicts. Identifying transitional justice as a concept that has recently emerged to designate a field of scholarly exploration and political practice “concerned with the aftermath of conflict and large-scale human rights abuses”, Eisikovits (2017) addresses four objectives of the transitional process as “creating a reliable record of past human rights abuses”, “setting up a functional, professional bureaucracy and civil service”, “helping victims and restructure and repair their lives”, and “stopping violence and consolidating stability” even though, according to him, these objectives can also come into conflict (see also Leebaw, 2008).

In addition to the conflict between some objectives of transitional justice, a salient dilemma in transitional justice studies appears as a trade-off between two leading human values, namely peace and justice. The conflict between peace and justice in the transitional process refers to the fact that “the demands of quiet and stability may well require compromising the morally important demands of retributive justice and

accountability” (Eisikovits, 2017). To illustrate this, on the one hand, it would not have been just if the wrongdoing actions of the dictatorship in Spain were overlooked; yet, on the other hand, if trials of wrongdoers were not specified in a right conjecture, then a civil war in Spain might have re-erupted too (ibid.). The tension here is that establishing peaceful or stable relations between social groups and communities may sometimes require making compromises from punitive measures, which are the primary means of retributive justice. In this regard, until the right conditions for transitional justice appear, societies may have to make a trade-off between the values of peace or stability and the value of justice, which can put peacebuilding institutions and institutions of justice into a conflicting position.

Conclusion

Justice is neither a unidimensional concept nor a phenomenon that can be simply and merely ensured with the distribution of some sort of desired and undesired outcomes. It is a multi-dimensional concept in a sense that involves and requires distributional actions, procedural rules, norms and policies, retributive regulations, and restorative arrangements. In some particularly intricate cases of injustice, this multidimensionality may dictate that we take into account all of these dimensions concurrently. On the other hand, looking at the given literature on justice, one can notice that concepts of justice and distributive, as well as social justice, are drawn on interchangeably by many leading scholars of the field and young researchers. This is, to a certain extent, understandable and also reasonable given that discussions on distributional issues in the broad literature of justice have occupied a central place since ancient times. Titans of classical philosophy, such as Plato and Aristotle, used the concept of justice in ways that involved both distributive and retributive senses. Such a use of the concept of justice can also be plausible considering that distribution does not only involve allocations of desired outcomes such as wealth, positions of power, and valued

resources but also involve undesired outcomes or evils such as poverty, deprivation of some opportunities, punishments, and so forth. However, given the complicated nature of justice as a phenomenon in the contemporary era and the intricate requirements its realisation demands, there is also a plausible reason to raise a critical argument concerning such interchangeable usage of the concept.

Taking this critical argument into account and recognizing its value, this chapter has focused on different forms, or families, of justice, as well as their scopes. However, it aimed not only to identify these theories' distinctive characteristics, focal points, and primary questions but also tried to present these characteristics, points, and questions in an associative way, with the purpose of demonstrating the intersectional nature of these diverse forms of justice theories. In doing so, it first sheds light on theories of distributive, or social, justice by addressing the fact that this form of justice and normative theories in this family of justice studies are by nature competing and contending perspectives that primarily aspire to find out answers to the questions of who should get what, and why. Secondly, it turned its attention to the family of theories known as procedural justice and discussed them to find an answer to the question of "how to distribute" since not only distributive outcomes but also the process of arriving at these outcomes morally matter to achieve the just society. At this point, an intersectional characteristic of these two families' justice theories appears as they play a complementary role for each other to fulfil the primary objective of just distribution of both goods, in other words, desired outcomes and evils, in other words, undesired outcomes. Subsequently, this chapter moved to discuss retributive justice, a particular family of theories in justice studies that, broadly speaking, focus on how punishment should be arranged in a just society. These theories particularly seek to identify just modes of punishment, and usually, three dominant perspectives, namely retribution, deterrence, and rehabilitation-based ones, are addressed as just forms of punishment. The fourth and last form

of justice studies, that is restorative justice, was also broadly discussed as a distinctive family of justice theories that seeks healing objectives of healing unjust and wrongful acts, which can take various forms, but mostly as an apology, restitution, and performing community service. The important point is that retributive justice and restorative justice can be considered inseparable and complementary parts of each other since ensuring justice does not only require punishment of wrongdoings acts of transgressors but also the necessities of healing the loss of victims that have become subjects of these wrongdoings.

Apart from these four broad forms of justice theories, this chapter also briefly identified and discussed two different areas of justice, namely organisation justice and transitional justice, which are not, in fact, distinctive forms of justice but are more of subject areas that can be considered under the headings of distributive justice, procedural justice, retributive justice, and restorative justice. The primary purpose behind involving these subject areas was to help the reader to distinguish what we mean by forms of justice and subjects areas of justice studies.

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Rendering Them (In)Visible: Injustices and Paradoxes of Taxation among Undocumented Immigrants

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Introduction

Undocumented immigrants in the United States navigate a web of paradoxes. They contribute significantly to the national tax revenue yet are largely excluded from the benefits their fiscal inputs underpin. This illuminates the paradox of differential access: despite their tax contributions, their legal status hinders them from fully accessing the “civic minimum” (White, 2003) or the baseline level of rights, resources, and respect a liberal democratic state owes to its citizens and residents (cf. Carens, 2008). Many factors shape this inequity, not least because of the restrictive legal frameworks, pervasive sociocultural stigmas, and deeply rooted prejudices within institutional policy structures. These immigrants’ lives are also marked by persistent performativity (Chauvin and Garcés-Mascareñas, 2014) as they negotiate identities as “good” (enough) citizens through their tax contributions while simultaneously living in the shadows of “illegality.” Here, they engage with what I refer to as “taxation circuits,” or the specific networks and systems through which immigrants contribute to national tax revenue. I draw this

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idea from Zelizer's (1994) concept of "circuits of commerce," where monetary transactions are imbued with meanings and moralities, acquiring distinct meanings and rules within different social contexts. These circuits of taxation emphasize the unique social practices and institutional structures that shape immigrants' fiscal participation, teasing out a paradox of visibility (as tax contributors) and vulnerability (due to their legal status) as they navigate both recognition and risk.

This quest for legal status introduces yet another paradox. Tax compliance illustrates a precarious balance between economic participation sans comprehensive rights and pursuing legal status amid heightened surveillance. While records of tax compliance and, to a lesser extent, other forms of civic engagements underscore undocumented immigrants' "good moral character"—a crucial criterion in the regularization process—they also amplify their visibility to state surveillance systems. This complexity of the immigrant experience covers several dimensions: navigating state policies and tax regimes; dealing with employment dynamics that involve legal alignment while paradoxically "documenting" illegal labor; and managing their responsibilities of care in the context of family or personal networks, where efforts at creating stability intertwine with the transnational flow of money. Nonetheless, immigrants persist, actively asserting their agency through varying strategies and degrees of acquiescence or resistance amidst these paradoxes. An examination of these concerns follows.

This chapter provides a brief look at how socioeconomic dependencies and inequalities in immigrant labor have changed over time which will be followed by a discussion of the phenomenon known as the "chilling effect" and some of the deterrents that limit immigrant access to public services. Afterward, it discusses the role of taxation in the regularization process to reveal how tax compliance, seen as an emblem of the immigrant's "good moral character," impacts the securing of rights proportionate to their fiscal contributions. The final section analyzes how economic transactions intersect

with personal relationships and societal norms in the lives of these immigrants.

Contradictions in Visibility and Legibility

The paradox undocumented immigrants encounter is deeply rooted in the notion of substantive citizenship, where rights far from being simple formal markers of membership are also legitimate claims to protection and welfare (Isin and Wood, 1999). It also includes aspirations that these rights are effectively practiced and upheld in society (Isin and Wood, 1999; Bosniak, 2006). Undocumented immigrants participate in dynamic economic roles (Portes and Rumbaut, 2006), enrich the societal fabric through their cultural contributions (Bada et al., 2006), and maintain transnational connections (Abrego, 2014)—even in the absence of formal citizenship recognition. However, often fueled by stigmatizing media representations, these can be met with public perceptions and attitudes that contribute to their marginalization, which can, in turn, play a crucial role in shaping state policies, reinforcing punitive measures, or hindering the development of more inclusive ones (Chavez, 2008). In a Foucauldian sense, state power exacerbates this paradox, creating a precarious subjectivity for undocumented immigrants while securing their societal and economic contributions (Foucault, 1991). I will return to this in a later section.

The status of undocumented migrants, however, does not exist as an outright exclusion but rather as one that serves state interests through a “probationary” stage within a broader continuum of citizenship (see Chauvin and Garcés-Mascreñas, 2012). This liminal phase of neither being entirely included nor fully excluded from the citizenry is not experienced uniformly by all undocumented immigrants. The intersection of legal status with race, class, or gender adds further nuance to this issue. Undocumented women, particularly those of color, may find themselves doubly marginalized by their undocumented status and gender as they encounter specific hardships like wage discrimination, sexual harassment, and

limited access to social services (Hondagneu-Sotelo, 1994). Some low-income immigrants may face economic exploitation and compounded barriers in accessing social and legal resources to navigate the complexities of the regularization process (Menjívar and Abrego, 2012). As these examples illustrate, legal status, in conjunction with other socioeconomic factors rather than in isolation, influences their ability to assert rights or access opportunities. From this view, legal status is neither a static nor a uniform experience, as its impact is mediated and augmented by other social positions. The complexities of race, gender, and class are not merely additive but integrative. These attributes compound the effects of legal status and more accurately reflect the nuanced character of the immigrants' everyday life. Thus, we should view this legal continuum not in terms of a rigid or linear progression but one that is responsive to and shaped by the realities of everyday life. Yet, despite this flexibility, the probationary nature of this citizenship remains a robust structure. It continues to act as a determining force, interacting with other social categorizations but also wielding its distinct regulatory authority. For example, the state employs mechanisms of insecurity and precarity to promote self-regulation and documentable "good behavior" or "good moral character" as a *potential* route to regularization. Consider the Internal Revenue Service (IRS) policy allowing undocumented immigrants to pay taxes using Individual Taxpayer Identification Numbers (ITIN) instead of Social Security Numbers. This not only allows the state to bolster its tax revenue but also curates the image of a responsible, law-abiding, "good" immigrant, intended to reinforce the illusion of achievable upward mobility. Another manifestation of this dynamic can be seen in the U.S. labor laws with the H-2A and H-2B visa programs designed for temporary agricultural and non-agricultural workers, respectively. The conditions of these visas tie workers directly to their employers. They do not offer a path to citizenship, and workers can be deported if they lose their jobs. Paying taxes on the wages earned under these programs is mandatory amid their precarious and often

exploitative labor conditions (Holmes, 2013). Again, these obligations reinforce the state's narrative of the "good" worker who fulfills their civic duty through taxation but without assurances of long-term security or socio-economic advancement. The state's manipulation of immigrant insecurity and precarity is evident in both these instances. Indeed, the state wields power to categorize migrants as "good" or "bad" based on their perceived economic contributions and adherence to certain civic norms, which are arbitrary, subjective, and inherently ideological (Anderson, 2013). These categorizations, in turn, reinforce the societal narrative of the "deserving immigrant" (Chauvin and Garcés-Mascreñas 2014; Coutin, 2003), which can divert the public's attention from the systemic issues that underpin these precarious conditions. Tax payment, as a measure of "good moral character" and an integral part of regularization processes, emphasizes the paradox of undocumented immigrants making substantial economic contributions while their legal statuses remain conditional and precarious. By adhering to such fiscal responsibilities, they negotiate the narrative of "deservingness," where worthiness is assessed not just through societal and economic contributions but also through adherence to state-sanctioned behaviors and norms.

Undocumented immigrants, however, are active social agents. They employ strategies to assert their worth and value, resist marginalization, and navigate societal norms and expectations amid systemic barriers. Undocumented immigrants engage with labor unions and informal worker associations and strive to enhance labor conditions, negotiate wages, and push back against workplace exploitation (Gleeson, 2010; Zolniski, 2006). They participate in collective action, such as public protests and civil rights campaigning (Nicholls, 2013). They maintain informal community networks and generate mutual support and protection, which helps dampen the effects of economic instability and social exclusion (Menjívar, 2000; Portes and Sensenbrenner, 1993). They actively partake in the local economy, not only by creating employment

opportunities but also those that involve entrepreneurial endeavors tailored to local community needs (Portes and Yiu, 2013). Of course, it is worth noting that for many, personal or family survival takes center stage. This is largely shaped by personal or family preferences, values, culture, social capital, legal situations, and unique circumstances. Keeping a low profile under the shadows or using other defensive strategies ultimately reflects these situations. These defensive practices, nonetheless, represent a vital aspect of immigrant “legal consciousness” (Ewick and Silbey, 1998) that extends beyond knowing or understanding formal rules and includes a broader range of strategies for negotiation, resistance, and survival (Abrego, 2012). Their everyday practices emerge as arenas for negotiation and resistance, serving as a platform for rearticulating their identities within a system that, in a way, acknowledges their contributions but also perpetuates their exploitation and marginalization. We may view this as what Foucault (1991) refers to as the “conduct of conduct” (Foucault, 1991) in action or how states and institutions shape the behavior of individuals. This may involve varying degrees of compliance, acquiescence, and pushback from immigrants. Thus, as these immigrants exert agency in crafting their paths, a nuanced understanding emerges. While their social practices demonstrate resilience, they are shaped and sometimes constrained by the state’s gaze.

Our understanding of this paradox is further refined through the lens of state legibility (Scott, 1998), where taxation regimes seek to simplify complex societal realities to render undocumented immigrants’ fiscal contributions “legible.” Here, quantifiable economic and civic contributions are made visible to the state and require different strategies to navigate. As a result, immigrants use strategies such as consistent tax payment and maintaining clean criminal records to demonstrate their “worthiness” for regularization (Menjívar, 2006). They diligently accumulate “official and semiofficial proofs of presence” such as tax payments, certificates of good conduct, and other indicators of good citizenship (Chauvin

and Garcés-Mascreñas, 2012). “Good citizen” behaviors, like stable employment and community engagement, are used by undocumented workers to establish a sense of normalcy in their lived experiences (Blomeraad et al., 2017), including tax payments and adherence to local laws, and so on. Perhaps unsurprisingly, not all undocumented immigrants are aware of these taxation requirements and strategies. They may also prioritize immediate survival and current needs over long-term planning for regularization due to the urgencies of daily living.

For those who pursue regularization routes, however, the process is filled with challenges and uncertainties. They must gather and maintain evidence of their “worthiness” (Menjívar, 2006), a task that can be demanding in light of tightening immigration surveillance and scrutiny (De Genova, 2002) and vulnerabilities in the labor market (Gomberg-Muñoz, 2012). Social and community engagement can also present risks (Lai, 2020; Perez et al., 2010). They may also encounter limits in healthcare and education accessibility (Hacker et al., 2015; Cha et al., 2019; Abrego, 2006) and welfare (Ambrosini, 2014). These challenges can paradoxically render them “more illegal,” marking their pathway toward potential regularization with an enduring struggle. As such, the immigrant practices that improve their social and civic integration can concurrently heighten their risk and visibility to authorities. The interaction between state-imposed visibility and the real-life experiences of undocumented immigrants, thus, unveils a layered relationship as the immigrants attempt to render their contributions “recognizable” within state parameters.

Paradoxically, by focusing on these tangible metrics, the state often renders these immigrants’ lived experiences, identities, and cultural contributions “illegible.” Willen (2007), in her study of the experiences of undocumented migrant workers in Tel Aviv, found that the state’s formal processes often fail to fully recognize or understand the complexities of the “migrant condition.” While the migrants could provide tangible proofs of presence, such as work contracts or pay slips,

the richness and nuance of their lived experiences often remained illegible to formal institutions. In a parallel observation, Blomeraad and her colleagues' (2017) study on apolitical immigrants of Mexican origin in the San Francisco Bay area underscored how citizenship is not necessarily viewed as an avenue to exercise political voice or partake in democratic practices. Instead, these immigrants emphasize respecting the law, staying out of trouble, paying taxes, and demonstrating good moral character.

Migrant "illegality" extends beyond mere legal status. The economic implications of Mexican labor migration, particularly from the lower-wage sectors, often recede in the face of dominant narratives surrounding legality. This intricate "illegibility" is not limited to simple invisibility. Migrants, though acknowledged, are not understood or valued for their distinctiveness, and their equal status remains misrecognized (Basilio and Arun, 2022; see also, Honneth, 2007). De Genova (2002) argued, for example, that the enforcement at the U.S.-Mexico border is a symbolic marker that deepens the distinction between nations. This distinction becomes not just a matter of policy or rhetoric but is, in essence, inscribed onto the immigrant body. The implications transcend national identities and intersect with broader societal perceptions and discourses about undocumented migration. In these contexts, many migrants, despite their willingness to fulfill their resident obligations, find their broader political and democratic engagement restricted. Their challenges—stemming from undocumented statuses, motivations, and contributions—resist easy categorization through the state's traditional frameworks of understanding. Such a profound misalignment signals a systemic form of violence. The "legal production of migrant illegality," in De Genova's (2005) examination of the experiences of Mexican workers in Chicago, involved experiences of labor exploitation, social and cultural contributions, resistance, and resilience that often remain unrecognized or misinterpreted in legal discourses and societal narratives. Menjívar and Abrego (2012) likewise detailed

the “legal violence” within U.S. immigration laws. They suggest that these laws not only complicate the lives of undocumented migrants but also obscure many of their hardships from the public’s purview.

Historical Frictions and Inequities

While undocumented immigrants navigate these frictions and paradoxical societal expectations, their historical impact on the socioeconomic landscape cannot be understated. Marked by stark inequities in taxation and wage distribution, this economic engagement reflects broader structural challenges for immigrants. Chinese immigrants during the 19th century played a vital role in infrastructure projects such as the Transcontinental Railroad. Even before the formal institutionalization of income taxes under the 16th Amendment in 1913, their labor generated taxable income that fed into the growing U.S. economy through pre-existing taxation structures, such as property and consumption taxes. This substantial economic input was made under harsh conditions and against the backdrop of discriminatory legislation. A salient example is the Foreign Miners’ Tax levied against foreign-born miners during the gold rush. Wanting to monopolize gold mining for (primarily white) American citizens and bolster a depleted state treasury, the tax imposed a monthly license of \$20—equivalent to over \$600 today (see Kanazawa, 2005). Enacted in 1882, the Chinese Exclusion Act banned Chinese laborers from immigrating to the U.S. for a decade, a ban that was intensified and extended by the 1892 Geary Act and largely continued until it was repealed in 1965. With these and other legislative constraints, Chinese immigrants resorted to undocumented work (Lee, 2003). The laws also disrupted communities by making legal family immigration nearly impossible, leading to a gender imbalance and the creation of “bachelor societies.” They circumvented these by adopting “paper sons” and “paper daughters” strategies, fabricating kinship ties with Chinese individuals already in the U.S. or exempt from the Act. These desperate measures underscore

the extent individuals would take to reunite with families and establish lives in a new homeland. Despite their economic contributions, the workers were increasingly vulnerable to exploitation as they lacked the protections and benefits afforded to documented and non-racialized workers.

Pivoting from the role of Chinese immigrants in the 19th century, the dynamic of labor exploitation and racialized taxation—where tax policies or outcomes disproportionately affect certain racial or ethnic groups—was echoed in Hawaii’s colonial plantation economy. Hawaiian sugar plantations, central to colonial and capitalist expansion in the Pacific, primarily sourced labor from Japan (Takaki, 1983), with substantial contributions from China (Glick, 1980; Miller, 2023), the Philippines (Labrador, 2015; Poblete, 2014), Portugal (Geschwender et al., 1988), Korea (Ch’oe, 2006), and Puerto Rico (Poblete, 2014). This immigrant labor, steeped in racial hierarchy, was crucial to the plantation economy, despite Asian workers enduring long hours, harsh rules, and wage discrimination for tasks similar to their ethnically Hawaiian and white counterparts (Jung, 2008). Such wage inequities would have translated into differential tax burdens, aggravating economic inequalities. This context of inequality is further obliquely illustrated by the collective actions of Japanese plantation workers demanding equal wages and improved working conditions, which, although not driven by tax grievances per se, shed light on the broader systemic disparities (Okiihiro, 1992). Trask (1999) underscores how the colonial and capitalist labor exploitation in Hawaii left workers with limited legal protections and means of redress. Given these oppressive conditions, it is plausible that many workers turned to unauthorized labor as a survival strategy, especially when formal avenues were exploitative or inaccessible. This pattern resonates with labor history, where marginalized workers often resort to informal or “underground” economies in the face of systemic exploitation (Glenn, 2002). In contrast, amid these predominant narratives, certain immigrants, like Chinese merchants and entrepreneurs, forged

unique trajectories, adeptly navigating the colonial dynamics and establishing prominent roles in the economy (Miller, 2023).

Another significant chapter in the history of Hispanic immigrant labor in the United States unfolded with the advent of the Bracero Program in 1942. This bilateral agreement between Mexico and the U.S. was designed to fill labor shortages in the agriculture and railroad sectors at the onset of World War II. This program ushered in a wave of Mexican workers, both documented and undocumented, who significantly contributed to the U.S. economy in ways that have often been under-recognized (Calavita, 1992; Cohen, 2011; Ngai, 2014). Peaking in the 1950s with about 450,000 annual admissions (Martin and Rutledge, 2022), the Braceros generated wages and indirect tax revenue through expenditures on local goods, services, and remittances to Mexico. However, the Braceros typically earned low wages, and their strike efforts for pay raises often faced immediate, sometimes violent, push-back from farmers and local officials (Gamboa, 2016). They were also subjected to unclear payroll deductions tied to various taxes, daily charges, and medical fees unrelated to actual service usage (Gamboa, 2016). The Braceros were subject to a 10 percent wage deduction, framed as a “savings fund,” which was to be reclaimed upon the expiration of their contract and their subsequent return to Mexico. Yet many could never recoup this money. Decades after the program’s conclusion, several class-action lawsuits were filed on behalf of the aging Braceros to recover these deductions (www.casobracero.com). When the program ended in 1964, its legacy established a pattern of economic migration between Mexico and the U.S., shaping the migration networks we see today (Massey and Liang, 1989). Perhaps unsurprisingly, it also highlighted the exploitation and denial of rights to immigrant laborers, informing current discussions on immigration and taxation (e.g., Calavita, 1992; Martin and Rutledge, 2022; Rosenblum and Brick, 2011).

In parallel with the Bracero program, unauthorized crossings from Mexico increased. Workers, similar to the Braceros, were attracted to work opportunities but often bypassed official channels due to the harsh conditions associated with the program (Ngai, 2014). Independent work allowed them to avoid certain conditions, albeit potentially earning less and evading some program-related controls and mistreatment (Calavita, 1992; Cohen, 2011). The mid-1950s saw an aggressive response to rising unauthorized immigration, Operation Wetback, a campaign that targeted Mexican-American enclaves and agricultural regions across California and Texas to apprehend suspected illegal residents. Official figures suggest deportations exceeding a million, a claim contested by many due to inconsistent record keeping. Nevertheless, its impact on communities, the heightened vulnerability of undocumented workers, and the associated informal economy were undeniable (see also Hernandez, 2010). The narrative of immigrant labor's substantial contribution to the U.S.'s economic growth and infrastructural development is deeply intertwined with systemic inequities embedded in labor rights, social access, wage distribution, immigration policies, and tax burdens. Overall, the history of immigrant labor in the U.S. is marked by significant economic contributions alongside systemic inequities in labor rights, social access, wage distribution, immigration policies, and tax burdens.

Undocumented Labor and Taxation

Undocumented immigrants play a significant role in the U.S. labor market, primarily filling positions in the lower-wage and less-skilled sectors of each major industry. Legal obstacles, to the formal economy often push individuals to work "off-the-books" or unregulated work, but language limitations and lack of recognized qualifications are also often attributed as the reasons for this (Trevalyan et al., 2016; Grieco, 2004). This overdependence on undocumented labor in certain industries can lead to wage suppression and perpetuate inequalities in these sectors (Borjas, 2016; Peri and

Sparber, 2009). Undocumented workers, however, are afforded the same rights as other resident workers. For example, they are protected against discrimination based on national origin or citizenship status, are entitled to minimum wage and overtime pay, have a right to safe working conditions, and have the ability to engage in collective bargaining. In practice, however, because undocumented labor is often characterized within narratives of illegality and criminality (Genova, 2002), these rights are frequently overshadowed. This can deter workers from seeking redress for workplace abuses due to fear of detection and deportation. Compounded by stigmatization through political rhetoric and media portrayals, the structural inequities that they experience are further legitimized.

Undocumented workers also grapple with tax-related obligations and risks. The Internal Revenue Service (IRS) collects taxes from individuals without Social Security numbers (and those without legal immigration status) through an Individual Taxpayer Identification Number (ITIN). To encourage tax morale and compliance, the IRS also does not enforce immigration law or typically report immigration status to other government agencies. This separation underscores a paradox in which undocumented individuals are financially accountable and acknowledged for their economic contributions yet maintain a measure of legal invisibility. Hence, we see an estimated eight million undocumented immigrants contributing over \$11 billion to state and local tax revenue (ITEP, 2017). But we also know these workers are largely ineligible for various benefits the rest of U.S. taxpayers are entitled to, such as Social Security, Medicare, and unemployment insurance. Taxpayer benefits are limited to specific care, such as Medicaid during emergencies or Federal Emergency Management Agency (FEMA) support during disasters. Their children are also only entitled to free public primary and secondary education and are not eligible for public-funded student loans for higher education. Except in rare instances, they are also denied voting rights on local, state, or federal issues that significantly

impact their lives (Lipman, 2006). This tells us that undocumented immigrants are trapped in a sociocultural paradox. Their substantial economic contributions remain largely invisible in public discourse as they are under-acknowledged or misunderstood (Lipman, 2006; Gee et al., 2016).

The Chilling Effect

Undocumented immigrants may often experience a “chilling effect”—an apprehension driven by the fear of revealing their status—that constricts their access to federally funded healthcare services, educational programs, and welfare programs. For example, in a study on enrollment patterns in Medicaid, a public health insurance program intended for low-income and at-risk groups, Watson (2014) observed a decline in participation among children of noncitizens, irrespective of the child’s citizenship status. This finding is mirrored in the research by Vargas (2015), who discovered that the fear of parental deportation could lead to decreased enrollment in Medicaid among citizen children with noncitizen parents. These researches highlighted uncertainties regarding eligibility and apprehensions about potential repercussions on immigration status as primary factors deterring enrollment. Friedman and Venkataramani (2021) analyzed the chilling effect of stringent deportation enforcement policies on undocumented immigrants, particularly those of Hispanic origin. Their study revealed that heightened ICE activity led to fewer Hispanic individuals reporting regular healthcare providers or annual checkups. Such healthcare avoidance wasn’t seen in non-Hispanic adults, who are less impacted by deportation fears. This underscores how deportation fears, exacerbated by these policies, can limit access to crucial healthcare services—services partly funded by the taxes paid by these undocumented immigrants. Not just limited to individuals, the chilling effect can be observed over entire households (see also Gonzales, 2015). Yoshikawa (2011) noted how children of undocumented parents have reduced access to public assistance programs, while research by Capps and colleagues

(2017) showed that despite their contributions to local school funding through property taxes, immigrant children face numerous challenges in accessing educational opportunities, citing the fear of deportation as an important factor. Self-perceived or otherwise, the fear and apprehension engendered by their lack of legal status induce a performance of invisibility in public spaces that limits their participation in the country's economic and social life. Marked by public restraint and perhaps private freedom within the safety of private settings, we see a form of dual existence that illustrates the socio-cultural dynamics inherent in this paradox of substantive citizenship.

Undocumented Taxation and Regularization: A Complex Entanglement

Four pathways exist for undocumented immigrants to achieve legal status in the U.S.: securing asylum status, obtaining a U-Visa for victims of crime, transitioning from DACA status to a green card, and marrying a U.S. citizen (Basilio, 2023). Tax compliance is not an explicit requirement in the first two scenarios, and it is an essential factor in the contexts of the latter two as it contributes to an overall assessment of “good moral character.”

The looming risk of deportation, or the constant condition of “deportability” (De Genova, 2002), underlines the risks associated with tax non-compliance. According to US law, foreign individuals violating immigration or any other U.S. laws—including those related to taxation—are at risk of deportation. While many individuals evade arrest, or the legal and administrative actions are not successfully carried out (Chauvin and Garcés-Mascreñas, 2014), just the same, the threat of deportation contributes to adverse and distressing experiences for undocumented immigrants and their families. This state of deportability can be seen as a consequence of a form of Foucauldian governmentality where state power as exercised goes beyond direct laws and regulations and extends to shaping behaviors and attitudes, penetrating all aspects of unauthorized migrants’ lives, including those related to taxation.

Undocumented immigrants often lean on tax records in view of future regularization. However, tax compliance is not without its pitfalls. Errors or inaccuracies, should they emerge, can have consequences. Despite immigrants' good faith efforts, applications for regularization are sensitive to missteps like submitting incorrect forms or overlooking deadlines (Coutin, 2008). Furthermore, due to the discretionary nature of immigration adjudication, decisions can be influenced by broader immigration policies, political climates, bureaucratic protocols, and personal biases (Motomura, 2014). Thus, regardless of consistent tax compliance, outcomes are not guaranteed and can be influenced by many other factors. Within this context, immigrants are also forced to perform within a moral economy, where "good moral character" plays a pivotal role. This performance is shrouded in paradox: they strive to demonstrate their moral character through diligent tax compliance. Yet, the sensitivity to errors and the discretionary nature of adjudication can render these efforts inconsequential. Undocumented immigrants find themselves in a complex balancing act, navigating paradoxical dual identities—striving to perform as "good" citizens through their economic and societal contributions while concurrently wrestling with their ties to illegality. Drawing on Bloch's (2013) findings, their performative acts, in her example, such as maintaining employment under precarious conditions or developing alternative survival strategies, are not just motivated by societal expectations and the limitations imposed by their undocumented status. They are fundamentally aimed at achieving legitimacy, acceptance, and survival. Despite the constraints, these acts demonstrate an endeavor to assert their economic worth and participate in civic duties, shedding light on their resilience and resourcefulness in the face of marginalization.

Taxation and the Web of Social Relations

Taxation for undocumented immigrants is not confined to mere economic transactions. Expanding on the idea of "taxation circuits" I introduced earlier, tax systems are layered

with specific meanings, rules, and values that are shaped by economic, legal, social, and moral considerations—reflecting a form of “relational work” (Zelizer, 2005). Tax compliance is not simply an act of fiscal responsibility but a performative endeavor channeled in different ways. It allows individuals to assert their economic worth, care for loved ones, participate in civic life, achieve some sense of social legitimacy and acceptance, and so on. What this suggests is that the decisions and actions of undocumented immigrants regarding their tax compliance are situated within a broader context of social relationships and interdependencies and are not reducible to their objective economic or legal obligations. Here, undocumented immigrants actively construct and manage their personal networks within the context of their economic transactions as a form of relational work. This reinforces our understanding that systemic marginalization does not wholly undermine the immigrants’ continuous navigation through the taxation system; it reinforces their agency and presence. We can see this dynamic in various ways.

Undocumented workers navigate an occupational landscape shaped by dynamics between them and their employers. Some employers may empathize with their predicament and nurture their relationships; others might exploit their workers’ vulnerabilities or under or over-report income, making it difficult for them to file taxes. Workers navigate this murky landscape by adopting strategies to ensure economic survival within the constraints of their status. This can include using fabricated Social Security Numbers, borrowing identities from friends or relatives, withholding information about their status, or resorting to counterfeit documentation with or without the knowledge of their employers (cf. Horton, 2015). It’s worth noting that these take place within occupational relationships that are not necessarily adversarial. They can also be formed out of mutual necessity where undocumented workers, perceived as “essential,” fill labor market gaps or are admired for their commendable work ethics (Gomberg-Muñoz, 2010; Dawson et al., 2018). Despite these

opportunities and challenges, workplaces become platforms where taxes are withheld, and economic contributions are made, underlining the contradictory realities experienced by undocumented immigrants (Hall and Greenman, 2015). This reality further complicates the burden of taxation for undocumented workers, which can be compounded by unscrupulous employer practices and the indirect benefit reaped by the state from such an arrangement. These dynamics echo a paradox of visibility and invisibility, where immigrants are simultaneously seen and unseen, included and excluded within the broader social fabric.

Familial relations intersect with these economic and legal dynamics in profound ways. Nurturing relationships of care involves the commitment to provide for family members even amid legal and economic barriers. For instance, mixed-status families face unique challenges where parents are undocumented, but children are U.S. citizens. Parents' undocumented status can limit their access to child tax credits, affecting family well-being and child development (Yoshikawa, Godfrey, and Rivera, 2008). The saving behavior of undocumented immigrants, far from being straightforward, also reveals a layered complexity reflective of immigrant families' unique circumstances. For example, Vinogradova (2013) identified a unique pattern in the saving behaviors of undocumented immigrants who, due to fears of deportation, tend to maintain higher saving rates, at least initially. However, as time passes and individuals continue to avoid apprehension, their saving rate gradually declines. This observation underscores how undocumented immigrants' financial decisions are closely tied to their legal status and its associated uncertainties. Some immigrants also incur significant debt back home, often due to costs of migration (O'Leary, 2006) or "debt bondage" due to forced-labor arrangements or trafficking (Djajić and Vinogradova, 2013) or even to pay smugglers (Ortmeyer and Quinn, 2012). Many undocumented immigrants partition their taxed income, designate funds for their tax obligations, and prioritize and allot portions of their earnings for specific

needs. This may include funds for savings and debt payment, but also, importantly, for children's education, healthcare, or other essential family welfare needs. Domestic financial planning of these types illustrates how economic decisions are not just dictated by monetary considerations but are deeply intertwined with familial commitments and social responsibilities. This form of earmarking (Zelizer, 2017) emphasizes the multi-dimensional nature of financial practices among undocumented immigrants, where money is not merely a means of economic survival but is also a tool for nurturing family relationships and asserting moral values.

The transnational movement of "relational" money not only alleviates poverty for their families but also underscores global economic disparities. Although typically ensnared in low-wage U.S. jobs themselves, immigrants bolster their home economies through remittances: a form of poverty alleviation and global economic contribution (Abrego, 2014). Many undocumented immigrants appropriate a segment of their income to support families in their home countries. Their social existences stretch across borders by contributing to the global socio-economic fabric. This underscores the complexity of their identities and lived experiences. As we have seen, earmarking within families transcends mere financial strategy but is also imbued with transnational significance. This process transforms the mundane act of allocating funds into a meaningful gesture that reflects and reinforces familial commitments and social responsibilities across geographical borders.

Conclusion

In exploring the taxation experience of undocumented immigrants in this chapter, I highlighted the irreducibility of taxation as a mere economic transaction. Taxation symbolically represents the inherent paradoxes, complexities, and contested positions these individuals navigate within the broader socio-economic, regulatory, and relational systems currently in place in the United States. The immigrants'

complex position manifests in their nuanced relationships with the country's immigration regime, other institutional state actors, and employers, as well as in their family dynamics. Undocumented immigrants engage in civic activities by contributing significantly to state revenues through taxation. Yet this economic participation is an asymmetrically reciprocated act of civic involvement that lacks the full spectrum of the comprehensive rights and protections ordinarily attached to it by formal citizenship. This establishes a paradox of differential access. Their involvement in the tax system grants them visibility and recognition that is both a double-edged sword and fraught with tension. On the one hand, it opens the way for potential regularization claims, giving immigrants a sense of legitimacy and a possible pathway to legal status. On the other hand, complicated by social and cultural pressures, the possibilities of detection by immigration authorities are heightened, making this visibility an opportunity and a risk.

The performance of good "citizen-like" behavior while navigating the shadows of "illegality" can seemingly place regularization within reach, but it remains a challenging pursuit. Indeed, the experience of being trapped in a liminal state—simultaneously visible and invisible, invaluable and disposable—marks the everyday lives of undocumented immigrants. This interstitial condition not only reflects their legal status but also shapes their social identity and psychological well-being, unironically casting them into a continuous state of uncertainty and vulnerability. This dynamic also highlights the paradox of legibility: undocumented immigrants are made legible to the state in fiscal terms through taxation, yet their human complexities often remain illegible or dismissed due to their lack of legal status. Nevertheless, the agency of undocumented immigrants in the face of these contradictions is compelling. Despite their marginalized legal status and the potential risks their visibility incurs, they continue to contribute to their communities, the economy, and the social fabric of the country. They assert their worth, tacitly or overtly, and reject this invisibility.

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Justice, Perceptions, and Aspects of Perceived Injustice -An Empirical Case Study-

Benjamin Kerst¹

Introduction

This paper explores specific perceptions of injustice and underlying perceptions of inequality. In these perceptions, individuals articulate grievances by perceiving their own situation or the perceived situation of their in-group as unequal in comparison with the perceived situation of social groups constructed as out-groups and evaluating this as unjust. The main aim of this chapter is to analyse such perceptions of inequalities and injustices and to explore various aspects from which these perceptions are constituted, shaped, and influenced. For this purpose, concrete articulations of such perceptions will be subjected to an in-depth analysis and interpretation. This will be done on the empirical basis of data, which were collected through qualitative interviews during field research with young members of German marksmen's clubs (*Schützenvereine*). The theoretical frameworks of this analysis include the concepts of "perceived inequality," "perceived injustice," and the related concept of "relative deprivation," which are used to describe and analyse the empirical data.

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These concepts will be presented in the following section and set in relation to each other. This is followed by a brief description of the methodology underlying the empirical data base of this contribution, and a brief outline of the German marksmen's club milieu and its social organisation. In the main part of this paper, about the findings from the field, perceptions of injustice articulated in the interviews are analysed: These perceptions of injustice will first be described in terms of their fundamental content and driving force, and then, partly drawing on other concepts such as "producerism," aspects of these perceptions will be identified and explored in detail. In the last two chapters finally, the results of these analyses are summarised, assessed and an outlook on the relationship between perceived inequality or injustice and radicalisation is given, as well as impulses for the prevention of radicalisation in this regard.

A Theoretical Framework for the Concept of "Perceived Injustice"

In the context of this study, inequality in general is understood as an unequal distribution of valued outcomes within society. "[It] represents," as Franc and Pavlović (2021: 785-786) write, "the unavailability of the same quality or quantity of economic, social, political, or other resources, opportunities, or outcomes for specific individuals or groups within a society". Franc and Pavlović (2021: 785-786) are also highlighting various characteristics of inequality or perceived inequality: The multi-dimensional as well as the multi-level dimension of inequality, in that inequality can affect different dimensions (e.g., economic, political and educational) and take place between different actors and entities (e.g., individuals, groups, states) and can therefore also encompass different levels (micro, meso or macro level). For the context of this study, inequalities that affect the individual level and those that affect the group level are particularly relevant. In the former case, we are dealing with inequalities between individuals as the focal unit (inter-individual),

which exist on a vertical level and may relate, for example, to dimensions such as income, social status, or social mobility. These inequalities are referred to as “vertical inequalities”. The second case pertains to inequalities existing on a horizontal level between societal sub-groups (inter-group), which are constructed based on factors such as gender, class, and ethnicity. These inequalities are referred to as “horizontal inequalities” and are often related to the same dimensions as in the case of vertical inequalities. However, their focal units are not individuals but groups (see about these types of inequality also Stewart, 2000; Jasso and Kotz, 2008).

When it comes to the perception of inequality in particular, according to Franc and Pavlović (2021) the crucial point does not lie in the objective presence of an unequal distribution of valued outcomes. Objective inequality may exist, but “[...] it subjectively does not represent a problem even if it is perceived, as long as it is not considered unjust or unfair” (Franc and Pavlović, 2021: 786). In this respect, perceived inequality always has a normative and a relational dimension for these authors, because the perceived unequal distribution is evaluated as unjust against the background of certain normative, moral and value-based or other criteria and because two situations are set in relation or compared with each other (e.g., when an individual compares their income with that of another person in case of perceived vertical inequality). Now there are intersections between perceived inequality and relative deprivation, which Smith et al. (2012: 203) succinctly characterised as “[...] the judgment that one is worse off compared to some standard accompanied by feelings of anger and resentment”. In detail, Smith et al. (2012) define three necessary conditions for the presence of relative deprivation. The first condition relates to a “cognitive comparison” made by an individual (205). Regarding such comparisons, one possibility is an individual comparing themselves with other individuals of their in-group (*ibid.*), which can be seen in correspondence with the concept of “vertical inequality”. Another possibility is a comparison drawn by an individual between their

in-group and an out-group (*ibid.*), which can be seen in correspondence with the concept of “horizontal inequality” and is referred to in deprivation research also as “fraternal relative deprivation” (Zick, Küpper and Hövermann, 2011: 150; Runciman, 1966; Smith et al., 2012: 204; van den Bos, 2020: 571-72). Furthermore, Smith et al. (2012) acknowledge the possibility for an individual to compare their situation with that of members of an out-group (205). The second condition for relative deprivation is for the authors a “cognitive appraisal” that the individual or the individual’s in-group is “disadvantaged” in comparison, and the third condition is the view that the perceived disadvantage is “unfair” or unjust (204 f.). For Smith et al. (2012), this perception of injustice is furthermore associated with “justice-related affects” such as resentment, anger, and entitlement, as well as the expectation of what ought to be or the belief that one deserves what is lacking in comparison with the actual situation, expressed in the notion of “deservingness” (204 f.; 207-208; see also Smith and Pettigrew, 2015). Based on the characterisations of perceived inequality and relative deprivation presented above, in a first step (a), perceived inequality will refer, in the following, to the subjective perception of vertical or horizontal inequality, regardless of whether it exists objectively. In order to deal with cases in which inequality is perceived but not evaluated as unjust, in a second step (b), perceived injustice will be understood as the evaluation of a perceived inequality as unjust. In line with the mentioned understanding of relative deprivation, this evaluation will also be understood as associated with an affective component and/or with a belief of deservingness. Against this background, the overall complex (a) and (b) will be understood here as (a form of) “perceived injustice”.

Methodological Background, German Marksmanship, and Its Social Organization

The empirical data on which this article is based were collected during field research in the German marksmen’s club milieu between December 2018 and August 2019 (Kerst, 2021)

in the frame of the *DARE* (Dialogue about Radicalisation and Equality) *project*². The data include 23 qualitative (audio recorded and transcribed) interviews with young members of German marksmen's clubs alongside ethnographic observation in the milieu and some online research. The semi-structured interviews employed a common DARE project interview guide as its starting point and interviews were carried out either in my office or at a location chosen by the respondents, such as their clubhouse. All respondents gave informed written consent prior to the interview in line with the ethical guidelines of the project. The average (mean) age of respondents was 23.5 years and the median age was 25 years. The youngest respondent was, at the time of the interview, 16 years old, and the oldest respondent was 32 years old. Twelve respondents were male and 11 respondents were female. It is worth noting that the gender and age profiles of research participants do not reflect the average gender and age profile of the membership of the marksmen's clubs, which have a high proportion of male³ and older members (Deutscher Schützenbund, 2019; Leineweber et al., 2020: 58-59). The age profile of the study was dictated by the overall DARE project, which was focused on young people (aged 12-30 years), while the project also encouraged the elicitation of women's views and experiences in the milieus even where they were a minority. The study's sample does closely correspond with

² The overall aim of the project was to broaden the understanding of radicalisation and non-radicalisation and to explore possible relationships between radicalisation and (in)equality. One strand of the DARE research employed qualitative, including ethnographic methods, to understand young people's everyday encounters with, and responses to, radicalising messages in various milieus. The data on which this article is based comes from this research strand. The DARE-project has received funding from the European Union's Horizon 2020 research and innovation programme under grant agreement No 725349. This publication reflects only the views of the author(s); the European Commission and Research Executive Agency are not responsible for any information it contains. For more information about the project, see: <https://sites.manchester.ac.uk/dare/>

³ Traditionally, marksmen's clubs were largely men-only clubs. Even in the recent past, women were often not allowed to become active members. This has gradually changed, but some marksmen's clubs still do not allow women as active members, which was also the case in one of the clubs I researched.

wider marksmen's club membership distribution in terms of religious affiliation and ethnic background. Twenty respondents were of German origin, and 23 respondents were Christian (although not all of them were practising) and white. This corresponds to a study by the Federal Institute for Sports Science, which shows that in 2009, only 5% of members of marksmen's clubs had an immigration background (Breuer and Wicker, 2011: 151 ff.), but also to the statements of the respondents and my observations in the field.

During both the interviews and the subsequent analysis, my approach was to perceive and comprehend my respondents as marksmen, individuals immersed in a distinct marksmen's environment, while also recognizing them as ordinary young people. This was also reflected in the interviews. Not only were milieu-specific questions asked, but discussions covered a wide range of topics, including the respondents' childhood and adolescence, their family and other social relationships, their everyday life, their education and employment, as well as their opinions, perceptions, and experiences regarding radicalisation, as well as inequality and injustice. Some of what the respondents have shared in the interviews can certainly be explained by their milieu affiliation, or the marksmen's club milieu was an important factor in understanding the respondents. However, regarding the topic discussed in this article, this milieu affiliation presumably does not play a decisive role. Therefore, only a brief mention of this milieu will be made in the following.

The history of German marksmanship is centuries old (see for this and the following Leineweber et al., 2020: 19-51), dating back to the Middle Ages, when marksmen's clubs first appeared in the form of marksmen's guilds and brotherhoods and provided security, protection and order within medieval towns. Today it is recognised as an 'intangible cultural heritage'; according to the German UNESCO Commission, "[i]n many regions, marksmanship is an important and vibrant part of the regional or local identity. It incorporates many customs and traditions, which manifest themselves in different ways"

(Deutsche UNESCO-Kommision, n.d.). The marksmen's club milieu, with its over one million marksmen throughout Germany, is characterised by a strong sense of community and a Christian and middle-class or civic self-understanding. In the public perception, marksmen's clubs are considered to be rather conservative (Burger, 2014). This is reflected in the importance placed by many clubs on values, history, the "home" (*Heimat*) customs, and traditions and their often hierarchical or military organisational structure.

One of the reasons why the Marksmen's Club milieu was finally selected as a research focus within a project about radicalisation is because the aforementioned characteristics, along with others, hold appeal for right-wing and extreme right-wing individuals. But it is important to note that this selection does not assume that the broader milieu or individual clubs are radical or extreme right-wing according to classical definitions. Additionally, the milieu demonstrates other characteristics, including (Christian) values, a strong sense of community, and democratic structures, which can potentially deter young people from radicalising towards violent political extremism. Consequently, the milieu was considered a promising environment to investigate both radicalisation and non-radicalisation pathways.

Findings from the Field: Aspects of Perceived Injustice

In the following empirical section based on the theoretical framework explored above, the perceptions of injustice that emerged in the interviews with the young marksmen are first presented with regard to their fundamental content and drivers, namely the perception of a privileged position of out-groups with regard to the undeserved access to certain economic and other goods. Subsequently, aspects of this perception of injustice will be identified and explored, such as partly negative, racist, and prejudiced evaluations of out-groups; perceptions of meaninglessness and devaluation regarding one's own work; perceptions of being affected by financial

shortages and economic inequalities; a strong work orientation and the endorsement of parts of a productivist ideology; the perception that one's own in-group is also affected by inequality; and justice-related affects.

Perceptions of Injustice

In the interviews on which this contribution is based, I also spoke with respondents about their perceptions of what they considered to be unequal or unjust. In terms of general opinions, there were respondents who viewed the wealth gap, income disparities, and educational inequalities in society as unjust. They described it as 'quite unjust' that the 'rich are getting richer and richer' while the 'poor are getting poorer and poorer', or they perceived it as unjust that individuals with potential are not adequately supported within the educational system, contrary to what should ideally be provided. The respondents expressed a desire for a society characterized by peace and prosperity, devoid of homelessness and poverty, with equal employment opportunities for everyone. They strongly believed that treating certain individuals differently from others is inherently unfair and forms the very essence of inequality.

However, the respondents also articulated not only general perceptions of inequality and injustice, but also grievances based on the comparison of one's own situation or that of respondents perceived in-group, with the perceived situation of various social groups or their members. An example of this is Marvin, who, like most respondents, I ask what he perceives as unjust. He responds and specifically highlights "Hartz IV⁴ recipients" and "asylum seekers". Regarding the first mentioned group, he expressed the following opinion:

Marvin: I think it's unjust that all those Hartz IV recipients are just too lazy to look for work. I like to go to work, even if it's

⁴ Hartz IV was a social welfare benefit program in Germany that provided financial assistance to individuals and families who were unemployed or had low income. It was launched in 2005 and was replaced by a new welfare system – "Citizen's Income" (*Bürgergeld*) – in 2023.

stressful, when the building site, when there's pressure and everything, your boss, but I like to go to work. And then I see people who sit at home, and we practically finance them, because they live off the state and everything, I think that's just antisocial. [...] So, when you simply don't feel like going to work... There are also days when I don't have any motivation and think "Wow, I'd rather call in sick and go to the doctor". But that only lasts, I don't know, half an hour, and then I end up going to work after all. And then there are these people who genuinely have no desire [for work], and I just don't understand that.

Researcher: Yes. You think the majority of Hartz IV recipients are like that?

Marvin: So, I would say yes. [...] They think, "I receive my money, I don't have to go to work, I live like a god." Sometimes they earn/ get even more money than some others earn, and I find that, in turn, uhm, even worse.

When it comes to the in-depth analysis of this expression of perceived injustice and the aspects of this perception, it is to emphasise firstly that Marvin's grievance is, in general, driven by his belief that he must work to earn his money, in comparison to the unemployed whom he believes receive money without doing anything for it, what is according to his evaluation unjust. In this respect, against the backdrop of the described concepts of perceived injustice and relative deprivation, these expressions by Marvin can be interpreted as a fundamental manifestation of perceived injustice, where two perceived situations are compared, perceived as unequal, and this perceived inequality is evaluated as unjust. In addition, there seem to be several aspects that constitute, shape and influence Marvin's and other respondents' perceptions of injustice. These and other aspects will now be explored in detail, supplemented by additional interview statements.

Unwilling to Work and Exploiting the German Welfare System

In Marvin's articulation of his fundamental perception of injustice and corresponding statements by other respondents,

the view was expressed that certain social groups or individuals from these groups were unwilling to work or would even exploit the German welfare system and would immigrate to Germany to do so. This meant unemployed people, refugees or immigrants, or unemployed refugees and immigrants who were, in the point of view of these respondents, too “lazy” to work or “didn’t feel like it” (Ronja) or would rather stay at home “all day” (Max), “hang out on the couch” (Frederik) or behaving “parasitically” (Uschi) in acting as “social parasites” (Steven). As far as the group of refugees and immigrants was concerned, these so-called “economic refugees” or “economic migrants” were denied the legitimacy to immigrate to Germany, in contrast to refugees from war zones referred to as “war refugees” by some respondents. One good example of that point of view is Steven. He believes that on the one hand, there are refugees who have been “forced to flee” and who “want to achieve something in Germany,” and on the other hand, there is the other type of refugees, in his opinion, who are exploiting the German welfare system and to whom he refers to in a very pejorative way of expression as “social parasites” (*Sozialschmarotzer*):

But the real social parasites who come here, that’s just what I call them now, we don’t need them. Well, I don’t need them. Because in principle I work for these people, I pay taxes for these people. (Steven)

Overall, several respondents perceived the proportion of individuals from these groups who, in the opinion of these respondents, were unwilling to work and potentially wanted to exploit the social welfare system as high or relatively high. So, one respondent, for example, believed that the majority of Hartz IV recipients were unwilling to work. Similar assessments were made regarding what members of these groups receive without having to put in any effort, which, in several cases, were found to be incorrect and greatly exaggerated. This is also applicable to the estimated number of refugees or immigrants, which, in the case of some respondents, was highly overestimated and/or regarded as too high – a perception that

can be seen as a form of numerological racism, as described by Hage (2014: 233), that involves concerns about an excessive presence of individuals from a specific group. In this respect Steven believes that 60% of the German population is “no longer German at all” and that “20 million refugees have come to Germany, some of them with 50 children”. Steven also believes that they got immediately “child benefits⁵” (*Kindergeld*) for their child’s, an “entry visa, further money and a key to a flat”.

The opinion expressed in the respondent set that members of the mentioned social groups are unwilling to work to a relatively high extent or even exploit the German social system has also been reflected in a regular and representative survey, the so called “centre studies,” measuring levels of negative and partly racist prejudice towards various (minority) groups in society and other values in Germany since 2002 (Zick et al., 2019), as well as in a broader European context (Zick and Küpper, 2014; Zick, Küpper and Hövermann, 2011). According to this survey in the year 2019, the majority of participants held the belief that unemployed individuals had no interest in finding a job, with 25.8% responding “rather” and 24.8% responding “completely” (Zick et al., 2019: 69; 74-75). Additionally, 23.3% agreed “rather,” and 40.5% agreed “completely” with the statement that they found it “outrageous when long-term unemployed individuals live comfortably at the expense of society” (ibid.). Regarding asylum seekers, 25% of participants agreed “rather,” and 19.2% agreed “completely” with the statement that “most asylum seekers are not actually persecuted in their home country” (ibid.: 68; 72-73).

⁵ Child benefit is a monthly payment given from the German Government to German parents, regardless of their income, to ensure that their children’s basic needs are covered. Under certain conditions, EU citizens and foreign nationals living in Germany can also receive child benefit for their children.

The Meaninglessness and the Devaluation of One's Own Work

In conjunction with the belief that certain social groups exploit the German welfare system, which against the background of the just presented survey results in the case of some respondents, can also be interpreted as an expressed negative prejudice against the corresponding social groups, the perception of injustice among the quoted and other respondents was also fuelled by another aspect: Namely an annoyance, which can be seen in similarity with the just mentioned outrage about the long-term unemployed measured in the centre studies, that oneself or the working population would be paying for these groups, referring to the fact that in Germany, transfer payments such as Hartz IV or costs associated with immigration are financed by tax money. This annoyance is also evident in Camilla, who asked herself why she pays “taxes at all” or “goes to work at all”. Frederik expressed a similar opinion:

Frederik: Yes. Because I don't understand that all these people live off the state [through welfare benefits], uhm, that we pay people.

Researcher: Do you think that's unjust?

Frederik: Quite, when I think that people sit at home on the couch and earn just as much money as I do. Then I think to myself: 'What am I doing this for?'

Thus, from the last and previously quoted statements, another aspect of the respondents' perceptions of injustice can be derived, namely the perception that one's own work seems meaningless in a certain respect or that its value is devalued in comparison to the fact that others receive economic and other goods without doing anything or even take exploitation of this situation. What exacerbates this perception of meaninglessness and devaluation is the perception that the money that the criticised social groups receive from transfer payments is as high or even higher than respondents' own salaries.

Economic Inequalities

In addition, the respondents' articulation of perceptions of injustice also made direct reference to their own financial situation in that it was evaluated as insufficient or described as difficult, for example, by reporting constant or at least partial financial shortages or "economic insecurities" (Bossert and D'Ambrosio, 2013: 1018). In this respect, some respondents' perceptions of injustice also seem to be based on (perceived) economic inequalities. Accordingly, Steven told me:

[...]. Yeah, I think it's unjust. Because we practically bust our asses. For nothing. For a measly pension. For years. I mean, we work until we are death, you know? Even on our deathbeds, they will still tell us, "Go to work!" For those kinds of people [referring to the 'welfare cheats'], who have everything, while we're left here biting our nails. So, yeah, I think it's unjust. (Steven)

Ronja, for example, wonders where refugees get money for certain purchases that she and her partner cannot afford because of their low salaries, especially since their new housing situation has made it necessary to pay more attention to money:

I mean, most of them are still running around with the latest smartphones. You know, brandname shoes, brand-name clothes. And then you ask yourself, 'where did they get the money?' These are things we sometimes can't even afford ourselves. Because sometimes we already have such a low salary. [...] And since the move you realise that you have to pay more attention to your money. And that you just can't buy everything anymore. But most people live alone. And then you ask yourself how they can afford everything. (Ronja)

Work-Identity and Work-Mentality

Uschi also describes her own financial situation and compares it to the perceived situation of immigrants, or those immigrants she calls "economic refugees":

I am going to work for me and for my child. So, we can afford it. So that I can say, 'I got this from MY money and not from

Father State or not from any man who keeps me'. No. I have worked my ass off for this. Simple as that. For my self-esteem. And that's just parasitic what they are [the economic refugees] doing. Well, sure, if you can do it, why not? (Uschi)

What should be highlighted at this point regarding Uschi's statement is the strong connection she establishes between her work and her sense of self and identity or between her work and her self-esteem. Accordingly, Uschi emphasises that she works hard for her child and herself and at the same time stresses that this means she is neither dependent on a man, in the sense of a provider, nor on the state, in the sense of transfer payments, and thus also emphasises her identity as a hard-working and independent woman and person, which she explicitly links to her self-esteem at the same time. Max, another respondent, describes himself as a "working horse" and refers to the working population as "those who really do something physically, or mentally, it doesn't matter, in any case, those who pull themselves together and do something for their money". Max's statements can thus also be interpreted as an expression of a strong identification with his own work, which seems to take, like in Uschi's case, also the form of some kind of a "work-identity". Such a relatively strong identifications with work and representations of a "work-mentality" in the sense of a hard- and disciplined working person, which altogether can be described here as a "strong work orientation," were also found to varying degrees and in different forms among other respondents. This, for example, when Hanna emphasises that her parents, who have their own business, but also she herself, who works in this business alongside her studies, work "virtually around the clock". Another group of respondents at least emphasised that they like their work, even if it is not always easy or sometimes stressful. What is crucial now is that many respondents' implicit or explicit articulations of their work-identities, and work orientations, their emphasis on enjoying work, and the associated emphasis on hard, strenuous, and not always easy work, were partly set in opposition to those groups who were

at the same time accused of unwillingness to work and/or of exploiting the social welfare system. This is evident, for example, in the aforementioned statements of Uschi, or in the initially quoted Marvin, who finds it “unfair” “[...] that all those Hartz IV recipients are just too lazy to look for work,” while he is emphasizing that he likes “to go to work, even if it’s stressful, when there’s a building site, when there’s pressure and everything, your boss, but I like to go to work” (Marvin). This suggests, firstly, that the respondents’ perceptions of injustice may arise from the contrast between the non-existent work orientation attributed to the criticised social groups and their own strong work orientation attributed to themselves, or that these perceptions are further intensified by this contrast. Secondly, regarding the notion of deservingness mentioned above, the respondents’ perception of injustice can also be interpreted as their belief that it is unjust for the social groups they compare themselves with, or their members, to receive government welfare benefits because they would not have deserved them. In other words, it could be said that at the core of these respondents’ perceptions of injustice lies an idea of entitlement, merit, and deservingness, or undeservingness, regarding which individuals and social groups deserve or do not deserve certain goods and what the reasons for this are. This perception closely aligns with certain theories of distributive justice, particularly with desert-centred view of distributional process that originated in the liberal tradition of social justice (Arun, 2022: 1021-1022). In accordance with this desert-centred view of justice, Max believes that unemployed individuals, at least after a certain period of time, “should bring some contribution to society to deserve something,” even if he, like some other respondents, believes it is right that people who have become unemployed through no fault of their own are entitled to transfer benefits. Uschi describes a situation in a grocery store where a woman, whom she identified as a war refugee, becomes nervous and on the verge of a breakdown when something falls, leading Uschi to conclude:

Those are refugees. They deserve asylum. And not just any from Bulgaria. It really disgusts me now... What have those

[economic refugees] achieved? Or what are they fleeing from? Yes, from the economy. Well, then you should have done something better. Get a decent job. And don't have five or six children if you can't afford them. (Uschi)

Producerism

Now, in light of the previous considerations and the respondents' expressed strong work orientation, it becomes apparent that the notion of "deservingness" or "undeservingness" not only plays a significant role in their perceptions of injustice but is also closely connected to achievement, productivity, and work as conditions for deservingness – for which Uschi's statement can be seen as paradigmatic. This connection between deservingness or undeservingness and achievement, productivity, and work can also be interpreted as an expression of a productivist ideology and the corresponding mindset. Berlet and Lyons (2000) have highlighted this in the context of research on US populism, but it can also be found in other national contexts and political cultures, including Germany (Virchow, 2023). In this mindset, as emphasized by Ivaldi and Mazzoleni (2019: 7) for the case of "right-wing populist producerism" the productive "makers" are contrasted with the unproductive "takers". In this context, makers are described, among other things, as "hardworking producers" and "deserving people" (ibid.: 6), as the "backbone of economic prosperity," and as "defenders of moral values, such as work ethics and honesty," who as such "should be the sole recipients of the economic wealth of the community" (ibid.). Similarly, Jamin (2011) emphasises that "[v]alue creation and the idea of hard work are central tenants here; these producers are identified with the workplace, and hence efficiency, intelligence and especially merit" (27). In contrast, the "takers" are characterized as "unproductive" and/or alternatively described as "lazy," "unwilling to work" or "parasitic" (Virchow, 2023: 156). They are identified horizontally with lower classes, subordinate groups such as immigrants, or the "undeserving poor, who do not possess a work

ethic and are accused of undermining the prosperity of the community” (Ivaldi and Mazzoleni, 2019: 7). Vertically, what was rarely the case in the interviews underlying this study, they are identified with the elites, for example, in the form of politicians portrayed as corrupt (ibid.). Against the background of these explanations, a productivist mindset can be understood as a further aspect of the perceptions of injustice that have become visible in the respondent set: A mindset in which respondents, based on their work, their work-identity and work-mentality or their (self-perceived) strong work orientation, view themselves as productive makers who have rightfully earned the opportunity to partake in the economic prosperity of society, also considering their own contributions. In contrast, the unemployed, refugees, and immigrants are simultaneously perceived, at least in part, as unwilling to work, lazy, or as exploiters of the welfare state, and thus lacking a strong work orientation or a work orientation at all. Consequently, they are considered undeserving of participating in economic prosperity or receiving transfer payments.

Horizontal Inequality

So far, the cases discussed have primarily focused on situations where respondents perceived their own circumstances as unequal compared to certain social groups and evaluated this perceived inequality as unjust. These perceptions of inequality and injustice can thus be described as stemming from a rather egoistic perspective. However, there have also been cases where such perceptions extended beyond the individual or individual-group level and occurred at the inter-group level, as respondents adopted a fraternal or group-oriented perspective (Smith et al., 2012: 204). This highlights another aspect of respondents’ perceptions of inequality and injustice, namely that they can partly be described using the aforementioned concept of “horizontal” “perceived inequality” or “injustice,” along with related concepts such as “fraternal relative deprivation”. This means that respondents not only considered their own individual situation as unjust, but also the

perceived situation of their own “in-group” when compared to the perceived situation of “out-groups” with which (at least partly) the unemployed, refugees, and immigrants were identified. In addition, certain respondents also mentioned sub-groups, such as homeless individuals and retirees, whom they identified as victims of injustices and considered part of their own in-group. Other respondents evaluated the treatment of individuals from their social circle, such as friends, as unjust when compared to refugees and immigrants. It is also noteworthy that the majority of respondents articulated both egoistic and fraternal perceptions of injustice, and many of the egoistic articulations can be interpreted in a way that the corresponding respondents always understood themselves as part of their own in-group in their perceptions of injustice.

The criteria by which the in-group was constituted, and the criticised groups were simultaneously othered and made into out-groups, included identity-based criteria such as nationality or heritage, as well as criteria aligned with the productivist mindset, such as being employed, achieving something, being productive, paying taxes, or having a strong work orientation. An example of this perception of horizontal injustice can be seen in the case of Marvin, accompanied by a certain “welfare chauvinism,” wherein “the welfare state is seen as a system of social protection for those who belong to the ethnically defined community and have contributed to it” (Kitschelt, 1997: 22; regarding welfare chauvinism and its combination with producerism and populism in the populist radical right see Abts et al., 2021). So, Marvin is of the opinion that war refugees are not doing well, but at the same time, he emphasizes that “our fellow citizens are also not doing well” and refers to the example of homeless people. At another point in the interview, he states:

As a German you're treated unjustly, unjustifiably. They [asylum seekers] get practically everything shoved up their arse - they get an apartment and everything, and some of the people here are living on the street. When you sometimes walk through the city centre, especially in winter, you would like to take, I don't

know, one of these homeless people to your home, because he's not well or you see that he's freezing.

Similarly, Steven refers to German poorer people as well as the German pensioners who, as he emphasizes, helped to rebuild Germany after the war and who are “coming up shorter and shorter”. And also overall, Steven is of the opinion that “we” or “we Germans” should again “become more priority” and that “we have been neglected in the refugee crisis”.

Another respondent, Lena, describes the frustration of a friend who relied on state aid during graduating from school and was provided with an apartment by the authorities, but went without a kitchen for over half a year because refugees were given priority in kitchen allocations. This led to her friend voting for the right-wing populist to extreme right-wing party AfD (*Alternative for Germany*). Lena “understood” this voting-decision because “she is German, she lives here, she has a German passport, and she should be entitled to get help. But she doesn't get it because they say, ‘Yeah, the refugees have everything’. I don't know how I would react in such a situation. But if you're German and you see foreigners, immigrants getting help while you don't...” (Lena).

Justice-related Affects

As the final aspect to be examined in this paper regarding the perceptions of inequality and injustice in the respondent set, it is important to consider the “justice-related affects” emphasized by Smith et al. (2012: 207-208) as part of relative deprivation. Insofar these affects are associated with the evaluation of situations involving perceived inequality as unjust and were also connected to the expressions of perceptions of injustice among the respondents.

This is evident when respondents express their frustration, such as labelling it a “point of annoyance” and “annoying” that certain unemployed individuals receive state aid or transfer payments without any effort, or when Max refers to this situation as ‘his little seething volcano’ and finds it “shit-ty” that people “sit on the couch and earn money for doing

nothing". Similarly, Uschi finds it "disgusting" that economic refugees receive social benefits. Another example is Camilla, who describes her being "overwhelmed by emotions" when she believed that some refugees and immigrants were receiving social benefits unjustifiably. In addition, pejorative phrases such as "social parasites," "everything shoved up their arse," emotional emphasis on the hard work one does ("we practically bust our asses") or the above-described sense of meaninglessness and devaluation of this work against the background of the situations grieved as unjust can be interpreted as at least being connected to justice-related affects. The same applies, to provide two final examples, for the expression of certain emotional attachments, such as when Marvin, in the above quoted passage, mentions that he would have liked to take one of the freezing homeless people to his home. Steven and other respondents express a sense of "coming up short" or "being neglected" regarding the treatment of their own in-group, which can also be interpreted as a kind of feeling of "being a second-class citizen" (see for this Pilkington, 2016: 154-76; Poli and Arun, 2021: 412-414).

In line with Smith et al.'s (2012) understanding of deprivation, it can be concluded that the perceptions of injustice articulated by the respondents were accompanied by various forms of justice-related affects at different levels, which can be understood as further important aspects of these perceptions. Furthermore, it can be finally argued that the articulated perceptions of injustice, as well as their corresponding grievances, are also of an affective nature in the sense of a feeling of injustice, which is in turn co-constituted by the affects described above.

Assessing the Aspects of Perceived Injustice

The empirical basis of this study was the observation that within the respondent set of young marksmen's clubs' members, grievances were articulated when respondents described their own situation or that of their perceived in-group as "unjust" compared to the perceived situations of refugees,

immigrants, and the unemployed. Based on the presented concepts of “perceived inequality,” “perceived injustice,” and “relative deprivation,” these grievances were described as expressions of perceived injustice, and various aspects of these perceptions of injustice were explored and interpreted; partly through the lens of various further concepts, like that of “producerism”. The fundamental driving force behind these perceptions of injustice was initially highlighted as the perception that the aforementioned groups, who were constructed as out-groups, were considered privileged in terms of the distribution of economic (and sometimes other material and non-material) goods in the sense that they would receive such benefits without doing anything for it.

In connection with this, it was emphasized as a primary aspect of the perceived injustices evident in the respondent set that these groups, or at least significant portions of them, were attributed negative characteristics, some of which were partly prejudiced and racist, suggesting their unwillingness to work or their intention to exploit the German welfare system. It was also shown how, in the respondent set, the perception of a certain meaninglessness and devaluation of one’s own work was articulated, resulting from the aggrieved situation of being disadvantaged in comparison with the perceived advantaged situation of the other groups. Also, financial shortages and perceptions of economic inequalities described by the respondents were considered as a further aspect of perceptions of injustice. Another aspect that emerged from the data was differently shaped work-identities accompanied by the expression of a work-mentality, in the sense of a hard- and disciplined working person, which was summarised as a “strong work orientation”.

In connection with this, and with reference to the notion of “deservingness,” perceptions of injustice within the respondent set were also interpreted in such a way that these criticized out-groups or certain members of them were seen in these perceptions as undeserving of state benefits and other forms of aid. According to the respondents, these groups

were deemed undeserving because, as analysed based on the concept of “producerism,” they were perceived as unwilling to work, exploitative, and unproductive “takers” who, unlike hardworking and productive “makers,” did not deserve a share of the economic wealth of society.

Following that, it was highlighted that respondents, in relation to the expressed grievances, not only perceived their own individual situation as unjust compared to the criticized groups, but also constructed this evaluation from a group-based and horizontal perspective. This evaluation was made in terms of the perceived inequality between their own in-group, which was constituted based on identity criteria and/or criteria aligned with producerism, and the corresponding out-groups that were simultaneously othered through these criteria. In accordance with the initially presented concept of relative deprivation, it was finally exemplified how the articulated perceptions of injustice by respondents were influenced by various justice-related affects situated at different levels of these perceptions.

Thus, it can be concluded that the perceptions of inequality and injustice among the respondents, or the perceived unjust disparity between oneself and/or the in-group and the out-group, were constituted, shaped, and influenced by various aspects across multiple levels and dimensions, that were identified in this contribution based on empirical interview data. In this regard, perceived inequality and perceived injustice can always be understood as multidimensional phenomena. These aspects included an individual level egoistic perspective, as well as the collective level of fraternity that encompassed horizontal inequality and injustice. Furthermore, they encompassed the dimension of negative and partly racist charged prejudices and stereotypes, the dimension of perceived economic inequality, the dimension of self, identification and identity, the dimension of meaning, entitlement, merit, (un)deservingness, productivity, and recognition. Moreover, there was an identity-based or identarian

dimension through which the notions of self and others, in and out, were constructed, and finally, the significant dimension of affectivity.

Conclusion

As the data underlying this article were collected within a research project that also aimed to investigate the relationship between inequality and radicalisation (Storm, Pavlović, and Franc, 2020; Poli and Arun, 2021; Franc and Pavlović, 2018; Kerst, 2021: 38-44), in this conclusion a final outlook will be provided on how the multidimensional phenomena of perceived inequality and perceived injustice relates to the phenomenon of radicalisation. In this regard, it is worth noting that evidence from the systematic review of published studies conducted as part of the DARE project suggests, “[...] there is an indeterminate and inconsistent relationship between inequality and radicalisation but that there is a more consistent relationship between subjective (perceived) than objective inequality⁶ and radicalisation” (DARE, 2021: 2; Poli and Arun, 2021; Franc and Pavlović, 2018; Storm, Pavlović, and Franc, 2020: 32). In another study, the relationship between perceived inequality or injustice in the form of fraternal deprivation has been examined, and it has been found that this is of considerable relevance for predicting negative prejudices, such as those depicted above against the unemployed and asylum seekers, as well as discriminatory, racist and hostile attitudes towards various social (minority) groups rooted in an ideology of inequality. In other words: The more the respondents of these study see their in-group as being disadvantaged compared to an out-group, the more frequently they express such negative prejudices and attitudes towards such groups (Zick, Küpper, and Hövermann, 2011: 154-57; see for this also Pettigrew et al., 2008; Zick et

⁶ Regarding such objective inequalities Storm, Pavlović and Franc (2020) found in a systematic review of existing European survey datasets that there are relationships to radicalisation, including also economic inequality (92-94), which was explored in this contribution as one aspect of perceived injustice.

al., 2008; Rippl and Baier, 2005). Even though the presence of such negative prejudices and attitudes, which occur not only in radical/extreme milieus but also in broader sections of the population or in the so-called “centre of society” (*Mitte der Gesellschaft*), a phenomenon sometimes referred to as “extremism of the centre” (Decker, Kiess and Brähler, 2016), does not necessarily mean that the individual holding these prejudices and attitudes is radicalised, they can both be part of cognitive, emotional, and behavioural radicalisation processes and can provide an entry point to them (Kerst, 2021: 37-38). These studies demonstrate a positive relationship between inequality, particularly perceived inequality, and radicalisation, a connection emphasised in Moghaddam’s (2005) “staircase to terrorism” approach. In this approach, the process of radicalisation is metaphorically compared to climbing a narrowing staircase, progressing through six different levels with progressively fewer choices until reaching the terrorist act at the top of the staircase (Moghaddam, 2005: 161-162). However, for Moghaddam most people are and remain on the ground floor where material conditions (like poverty and a lack of education) are psychologically interpreted and “perceptions and feelings of relative deprivation” dominate (ibid.: 162): “Those who reach the first floor seek ways in which to improve their situation and achieve greater justice. But if they do not see possibilities for individual mobility and do not feel that they can adequately influence the procedures through which decisions are made, they are more likely to keep climbing” (ibid.). This also means that the prevention of radicalisation processes, which Moghaddam (2005: 167) emphasises under the heading “Prevention must come first,” involves improving the material conditions of people on the ground floor and counteracting socio-economic, socio-political, and other inequalities. As van den Bos (2020: 574-575) points out, strengthening democracy and opportunities for democratic participation is also highly relevant. Furthermore, concerning the perceptions of inequality and injustice analysed in this contribution, as discussed above, it has been shown that

these perceptions were also influenced by overestimations and incorrect information. This could be addressed preventively, similar to the negative prejudices, stereotypes, and racism articulated also in these perceptions, through measures such as providing accurate information, raising awareness, promoting civic education, and implementing prevention measures in general. Finally, it would be also crucial to critically confront the ideology of producerism in its categorisation of individuals and groups as either productive makers or unproductive and unwilling takers, along with the associated negative and partly racist prejudices and stigmatisations, and the idea that along this difference it is measured who is entitled to deserve a share of the economic wealth of society and who not. Contrary to this ideology, it is necessary to demonstrate that the true basis of inequalities and injustices analysed here are not rooted in the alleged preferential treatment of already marginalized social groups, but rather in the partially deprived and adverse material conditions faced by some of the respondents, as well as in socio-economic, socio-political, and broader societal inequalities, injustices, and disparities within a neoliberal capitalistic society.

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Inequalities in Cultural Capital and the American Educational Field: Trends and Policy Recommendations

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Introduction

The scholarly work on inequality in the United States has customarily consigned a strong emphasis on economic factors as the primary driver of social disparities. While economic inequality is a critical facet of the global picture, it is imperative to appreciate that social inequality is an intricate and many-sided phenomenon that stretches beyond economic considerations. This recognition underscores the need for a multi-oriented perspective that considers the interaction and intersection of varied social, cultural, and symbolic factors in molding and reproducing inequality (Bourdieu, 1977).

No wonder a growing number of researchers are utilizing Pierre Bourdieu's theory of generative structuralism to address this lacuna and provide an all-rounded understanding of social inequality. Indeed, Bourdieu's poly-angular framework offers a constructive substitute to the dominant economic-oriented perspective by going beyond the drawbacks of the theoretical approaches of social physics and social phenomenology, paradigms centered on either structural

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dynamics or symbolic interactionist processes in isolation (Bourdieu and Wacquant, 1992).

Without throwing the intellectual baby with the bath water, Bourdieu's theory transcends social physics and social phenomenology (Bourdieu and Wacquant, 1992). His generative structuralism offers a nuanced interpretation of social stratification that paves the way for considering the intersection of social structures, individual agency, and symbolic systems. Social inequality, thus, is not merely conditioned by economic factors but is also impacted by varied forms of capital, including cultural capital, social capital, symbolic capital, and more. By emphasizing the role of cultural practices, social networks, and symbolic systems in perpetuating and reproducing social disparities, Bourdieu's theory thus goes beyond the narrow lens of economic determinism (Calhoun and Postone, 1993; Swartz, 1997).

Consistent with the aforementioned fundamental assumptions, Bourdieu's generative structuralism offers a comprehensive set of conceptual tools that facilitate a proper understanding of social inequality. Concepts such as *habitus*, which refers to the internalized dispositions and outlooks individuals acquire through socialization, provide insight into how social structures are embodied and shape individual behavior. The notion of *fields* elucidates the specific social arenas in which individuals contest for different forms of capital, underlining the power dynamics and struggles for resources that sustain inequality. Bourdieu's expanded understanding of capital acknowledges individuals' diverse resources and their differential impact on social stratification.

In this chapter, we explore the application of generative structuralism within the concept of cultural capital, as quite a few scholars of educational research have showcased Bourdieu's theory's relevance in understanding social inequality within the educational order (see for instance, DiMaggio, 1982; Lareau, 2003; Naidoo, 2004). These inquiries delve into the larger socio-cultural backdrops of social stratification, elucidating the complex apparatuses that generate and

uphold disparity. By revealing these foundational mechanisms, these investigations aid in devising careful interventions to wrestle with societal discrepancies more adroitly and effectively. Before discussing these scholarly endeavors, let's outline Bourdieu's generative structuralism.

Generative Structuralism

Pierre Bourdieu's theory of generative structuralism offers a rich array of concepts that are highly relevant for the understanding of varied areas of social life, including language and society, power dynamics, social class relations and conflicts, social movements, and most importantly, social inequality (Alexander and McDowall, 2022; Beckman, et al., 2018; Kovacs, 2023; Lareau and Edwards, 2014; Lee and Edwards, 2014; Naidoo, 2004; Øygard, 2008; Reardon, 2016; Waterfield, 2015). Social researchers have rightly noted that these concepts provide a nuanced understanding of the mechanisms through which social stratification is constructed and reproduced.

A critical concept in Bourdieu's theory is the concept of habitus (Bourdieu, 1977 and 1984). The concept refers to an embodied sensibility (internalized dispositions, habits, and tastes) that individuals acquire through socialization and resocialization. Habitus forms individuals' perceptions, preferences, and behaviors, profoundly shaped by the social structures and conditions in which individuals are embedded. Yet they do not leave individuals as helpless constructs. Instead, the concept of habitus entails that individuals are not passive receptacles. They actively participate in making and unmaking social life within certain limits. By examining habitus, among other things, researchers can gain insight into how social inequalities are internalized and reproduced through individuals' everyday practices and interactions.

"Field" is another concept that complements Bourdieu's concept of capital (Bourdieu and Wacquant, 1992). A field refers to a relatively bounded social domain wherein active agents compete for varied forms of capital. Fields range from the economic sphere to cultural and educational arenas, each

with its social logic entailing a set of rules, power dynamics, and hierarchies. Bourdieu notes that the different forms of capital are valued and distributed within each field. Bourdieu's notion of field allows for a more nuanced understanding of the disparate sources of power and the benefits that promote social inequity.

In addition to the concepts of habitus and field, Bourdieu's expanded understanding of capital significantly contributes to the analysis of social life in general and social stratification in particular. Rather than relegating capital to economic resources alone, Bourdieu acknowledges that individuals can hold and leverage multiple forms of capital, including cultural, social, and symbolic. Whereas economic capital denotes financial assets and resources, cultural capital refers to knowledge, skills, and competencies attained through education and primary and secondary socialization. Social capital, conversely, relates to the relationships, networks, and social connections individuals possess. Social capital makes possible access to resources and opportunities. A related, yet unique, is the concept of symbolic capital. Symbolic capital refers to the respect, social esteem, and symbolic power individuals and groups enjoy based on possessing varied forms of capital related but not necessarily located within the framework of specific fields (Bourdieu, 1991).

By recognizing the existence of varied forms of capital (Bourdieu, 1986), Bourdieu's conceptual frame challenges reductionist economism, which recognizes capital in nothing save economic form. Bourdieu, accordingly, insists that economic factors do not merely condition social stratification, but rather, social inequality is molded by and perpetuated by a cluster of economic, social, cultural, and symbolic means. This enlarged conception provides investigators to understand the multiple ways in which individuals and groups are positioned within the socially stratified system and how different forms of capital interact and intersect to form and reproduce social inequality.

In addition to these concepts, Bourdieu's generative structuralism also includes the notion of symbolic violence, which refers to the power dynamics and processes through which dominant groups superimpose their social class outlook and values onto others. Symbolic violence functions through the seemingly recognizable mechanisms of social control, shaping individuals' aspirations, perceptions, and sense of *amour-propre*. Relatedly, the concept of *doxa* underscores the taken-for-granted suppositions and creeds that fortify social structures and add to the perpetuation of inequality. By examining *doxa*, researchers can unearth the profoundly impressed social norms and ideologies that prop up social hierarchies and propagate inequalities (Bourdieu, 1977).

By incorporating these concepts into the study of social inequality, social researchers have advanced a more nuanced and comprehensive grasp of how social stratification is created and sustained. Bourdieu's approach offers a powerful intellectual toolkit for understanding the complex chemistry between economic, social, cultural, and symbolic causes that reproduce social inequality. By applying these concepts, researchers have indeed revealed how social hierarchies are maintained, thereby providing expertise that suggests policy interventions and efforts to advance a more fair and just social order. Since cultural capital is the subject of our discussion, let us look at its nature in some detail.

Bourdieu's Concept of Cultural Capital

Cultural capital encompasses symbolic assets manifested through linguistic and cultural proficiency, often institutionalized in educational credentials, allowing individuals to uphold their prestige. However, cultural capital's stability is relatively precarious, subject to scrutiny and suspicion as a legitimate form of capital. Bourdieu's conception of cultural capital diverges from the functionalist interpretation of culture, which merely denotes societal values and norms for maintaining social order. Instead, culture becomes a pivotal tool for social reproduction, wherein linguistic and cultural

competence isn't innate but acquired through varied cultivation processes, favoring some over others.

Diverging from human capital theory, Bourdieu's notion of cultural capital extends beyond monetary investments. Human capital theorists, although heavily invested in establishing a link between education and economic outcomes, focus solely on monetarily related pursuits, neglecting the multifaceted dimensions of cultural capital. This narrow perspective leads them to gloss over intricate socialization processes and nuanced cultural transmission strategies. Consequently, the crucial role of domestic cultural capital transmission, a vital factor in the educational process, remains unexamined. Adherents of the human capital approach unwittingly adhere to a functionalist assumption, disregarding cultural capital's pivotal role in perpetuating social relationships.

Cultural capital, as outlined by Bourdieu, manifests in three distinct forms: objectified, embodied, and institutionalized (Bourdieu, 1986). In its embodied state, cultural capital takes the form of a cognitive sensibility ingrained over time. This internalization necessitates personal investment and cannot be delegated. Despite the lack of direct transferability, the acquisition of embodied cultural capital can be facilitated through other forms of capital, such as economic resources, often benefiting individuals with privileged backgrounds.

Objectified cultural capital, on the other hand, comprises tangible possessions like artworks and books, which can be exchanged more readily. However, meaningful utilization requires the appropriate disposition, linking intellectual significance to possession. Notably, those with the requisite disposition might not always hold objectified cultural capital, creating a nuanced position within the social hierarchy.

In its institutionalized mode, cultural capital takes the form of educational credentials. This institutionalization not only enhances cultural capital's value but also curbs skepticism. It establishes a distinction between officially recognized qualifications and mere possession, ensuring a stable position for cultural capital. This differentiation is upheld by institutions

that standardize recognition, facilitating exchange and preserving the value of both cultural and economic capital.

Cultural Capital and the Educational Order in the USA

Bourdieu's theory of cultural capital and its implications for social inequality within the United States find corroboration through empirical investigations and data. Due to spatial limitations, we are unable to delve into the entirety of these research endeavors. Therefore, our objective is to concentrate on a selected subset of studies to accomplish our goal.

In the study conducted by DiMaggio (1982) titled "Cultural Capital and School Success: The Impact of Status Culture Participation on the Grades of US High School Students," the researcher examined the connection between cultural capital and academic achievement among high school students in the United States. The research analyzed how participation in activities related to so-called high-status culture, including music, art, and literature, conditions students' academic feat.

DiMaggio's study is explicitly based on Bourdieu's concept of cultural capital, particularly referring to the non-financial social assets, such as skills, knowledge, and cultural preferences, that individuals possess and can use to their advantage within varied social milieu. An important premise of the study runs thus: Students with high cultural status are most likely to be endowed with skills and cultural knowledge that puts them at a better advantage regarding academic achievements. This quantitative research analyzed data from a nationally representative sample of US high school students. DiMaggio, accordingly, considered the link between students' involvement in cultural activities and their grades. He did this while simultaneously controlling for factors such as socioeconomic background. The research found a notable connection between cultural capital and academic performance. The finding suggested that there is indeed an organic link between involvement in high-status cultural activities on the one hand and higher grades on the other hand. In contrast, those not

engaged in such activities fall on the other end. This relationship does not fade away even after controlling for socioeconomic factors and calls to mind that cultural capital plays an independent role in molding academic achievement.

DiMaggio's study contributes to the understanding of how cultural capital impacts educational outcomes and buttresses the notion that cultural factors that go beyond traditional measures of socioeconomic status condition academic achievement. The results clearly show the significance of acknowledging and appreciating different cultural engagements within educational contexts simply because increasing access to high-status cultural activities promotes students' academic achievements.

In sum, DiMaggio's study highlights the significant impact of cultural capital on high school students' academic success. The study underscores the role of participation in high-status cultural activities as a key factor in improving grades and emphasizes the relevance of considering cultural involvement as a critical dimension of educational accomplishment.

Cultural capital's impact goes beyond the school system, reaching into the domain of college admissions. Acquiring germane cultural capital becomes crucial for students navigating these entry points effectively. The work of sociologist Annette Lareau and her colleagues (2011) examines how cultural capital plays a critical role in college admissions and transitions to tertiary education in the United States. They note that students from privileged backgrounds are endowed with relevant cultural capital lined up with dominant norms and expectations of colleges, giving them an added lead in the admissions process. In contrast, students from disadvantaged backgrounds are deficient in the cultural capital requisite for steering the college application process productively.

Another important study is by Sean F. Reardon and Ximena A. Portilla (2016). Under the title "Recent Trends in Income, Racial, and Ethnic School Readiness Gaps at Kindergarten Entry," their study examined the developments and patterns of income, racial, and ethnic disparities in school readiness

among kindergarteners in the United States. The researchers examined data from diverse national surveys to comprehend the transformations in school readiness gaps over the years.

A noteworthy finding from the study is the considerable progression of income-based school readiness differences over the past twenty years. The researchers disclose a marked dissimilarity between children hailing from high-income households and those from less affluent ones. High-income children display advanced educational and socio-emotional skills before they enter kindergarten, while their low-income peers trail behind in these dimensions. This increasing divergence indicates that children from low-income backgrounds start school with some constraints that have long-range impacts on their future educational outcomes and opportunities.

Besides, the researchers note increasing racial and ethnic differences in school readiness. That is to say, children from African American and Hispanic backgrounds, overall, join kindergarten with lower levels of school readiness in contrast to their White peers. These gaps show that there is unequal access to resources, opportunities, and quality early childhood education reinforcing educational inequalities right through students' academic footpaths.

The study also clearly shows an interplay between multiple factors (income, race, and ethnicity) in shaping school readiness gaps. It finds that children of racial and ethnic minorities with low-income backgrounds encounter multi-layered challenges in terms of school readiness. The analysis underlines the need for focused involvement and relevant policies that address the unique challenges children face at the juncture of multiple social identities.

Furthermore, the researchers review the prospective implications of these findings for educational equity and policy interventions. They rightly emphasize the significance of advancing high-quality early childhood education, particularly for children with disadvantaged backgrounds. Along with this, the researchers insist on the need for policies that are

aimed at reducing income disparities and offering equitable access to multiple resources, including preschool programs, affordable childcare, and family support services. Lastly, the investigators underline the need to deal with the underlying cause of all this, systemic racism. Without addressing systemic racism and implementing culturally responsive teaching practices, it is not possible, they contend, to overcome inequities in school readiness.

By and large, Reardon and Portilla's study (2016) sheds light on the trends of income, racial, and ethnic school readiness gaps at kindergarten entry in the United States. Under-scoring the urgency of dealing with these disparities to guarantee equitable opportunities for all children, irrespective of their socioeconomic status, race, or ethnicity, the findings clearly offer critical insights for policymakers, educators, and researchers working towards educational equity and closing the gaps in school readiness.

Our final examination centers on a study conducted by Annette Lareau (2003). Lareau's work, titled "Unequal Childhoods: Class, Race, and Family Life," stands as another significant exploration rooted in Bourdieu's theory. The study examined how social class and race interconnect with family dynamics molding children's educational experiences and future opportunities. Data for the study is based on in-depth ethnographic research. Lareau's study offers significant insights into the role of cultural capital on educational achievement and social mobility.

Among the critical findings are distinct parenting styles and strategies deployed by families from varied socioeconomic backgrounds. Lareau, accordingly, distinguishes two contrasting parenting strategies: concerted cultivation and natural growth. Whereas while families from middle-class backgrounds tend to adopt "concerted cultivation," characterized by organized schedules, involvement in structured extracurricular activities, and an emphasis on developing children's skills and talents, on the other hand, working-class and low-income families tend to follow a "natural growth"

orientation placing a diminished focus on structured activities thereby allowing for more unstructured play and independence.

Middle-class children cultivate a feeling of entitlement, self-assurance, and enhanced skills which helps them navigate through institutions productively. With increased cultural knowledge, including know-how in handling administrative processes, language proficiency, and a good understanding of educational institutions' norms and standards, these students possess the potential for success within their respective schools.

In contrast, working-class and poor children often encounter challenges from limited access to resources and opportunities. Their natural growth approach, while fostering independence and creativity, may not be congruent with the expectations and norms of educational institutions, often leading to difficulties in navigating academic settings and attaining required educational outcomes. The development of cultural capital among these students may be hindered since they have limited exposure to structured extracurricular activities, networks, and cultural experiences.

What is more, Lareau's critical study underscores the role of schools in reinforcing inequalities. Lareau identifies how school practices and expectations favor middle-class children, although the processes are exhausting. These children are more accustomed to speaking on behalf of themselves and interacting self-dependently with teachers and administrators. Working-class and poor children, in contrast, often encounter challenges in conforming to the expectations of schools, which can further constrain their educational success and social mobility.

In sum, Lareau's work has had a considerable consequence in examining the role of cultural capital in shaping educational inequalities. It calls attention to the need for policies and interventions that seriously deal with the disparities in accessing the resources and opportunities faced by children from disadvantaged backgrounds. By acknowledging the

influence of social class and family dynamics on children's social and educational experiences, policymakers, educators, and researchers can work towards creating a fairer academic order wherein children are offered the requisite opportunity and support critical to thriving intellectually.

Implications and Policy Recommendations

All these studies clearly delineate the link between socio-economic status and educational outcomes, noticeably showing the impact of cultural capital on educational inequalities. Concerning this link, four factors can be taken into consideration: access to educational resources; parental involvement and engagement; cultural norms and expectations; language and communication skills. Let's take each factor at a time.

No deep critical inquiry is required to find the role of education resources in student academic success, especially in this age where instructional technology has attained increasing relevance. Indeed, students from higher-income backgrounds can easily access various educational resources, including enrichment activities, books, tutoring services, and computers. Students' cultural capital is enhanced by the amount of access that they have to these educational resources. Students with these relevant resources both at school and at home have the advantage of improving their academic performance. In contrast, educational progress is hampered by students' lack of requisite intellectual resources readily available to students with higher socio-economic backgrounds.

An essential factor directly related to educational resources is parental involvement and engagement. There is an intimate relationship between cultural capital and parental involvement and engagement in a student's education. Parents from higher socioeconomic backgrounds have the requisite academic know-how to pilot through the educational systems with ease. Using their skills, they advocate for their children and participate in activities that augment their children's educational development. The engagement ranges from providing academic guidance at home to active participation

in parent-teacher conferences. On the other hand, parents from lower socioeconomic backgrounds encounter multiple barriers that bar them from active parental involvement and engagement. These barriers include limited resources, appropriate intellectual skills, limited resources, time constraints, and a shortage of familiarity with educational systems. These barriers, in sum, result in reduced support for their children's education.

It is more than just a lack of resources and intellectual skills on the part of their parents that puts students with lower socioeconomic backgrounds at a disadvantage within the educational system. Since higher socioeconomic status is aligned with dominant educational practices and expectations, these students are at a disadvantage from the very outset. For instance, middle-class parents emphasize higher education and academic success and encourage their children in extra-curricular activities that enhance their intellectual well-being. The cultural norms of the middle classes produce a familial environment favorable to academic achievement and the expansion of cultural capital. On the other hand, families from lower socioeconomic backgrounds may have dissimilar cultural yardsticks and beliefs that are not in line with dominant educational practices, causing cultural capital deficiency in their children and thereby hindering their academic success.

Cultural capital deficiency mainly manifests in a lack of language and communication skills proficiency. This essential aspect of cultural capital is readily available to those students with higher socioeconomic backgrounds. Students from higher socioeconomic backgrounds often have solid language skills, including verbal fluency, vocabulary, and grammar, intellectual instruments that reign in prominence in educational settings. These skills allow students to successfully impart ideas, effectively engage in classroom discussions, and shine in language-based assessments. On the other hand, students from lower socioeconomic backgrounds may encounter challenges associated with language proficiency,

which can seriously affect their ability to display their knowledge and skills copiously.

These cases underscore the critical role played by cultural capital in educational inequalities. Issues of equitable access to educational resources, increased parental involvement and engagement, recognition of diverse cultural norms and expectations, and language and communication development support cannot be taken lightly. Thus, educational disparities can only be dealt with when policymakers and educators implement policies to create an academic order wherein all students have the requisite cultural capital.

In conclusion, extant research unambiguously ascertains the inherent association between socioeconomic status and educational outcomes, with cultural capital asserting as a pivotal driver of educational disparities. This relationship is impacted by several critical elements: language and communication skills, parental involvement and engagement, cultural norms and expectations, and access to educational resources. Examining each one of these elements reveals the complex interplay of forces that mold students' academic futures and opportunities. The predominant significance of educational resources, especially in today's technology-driven global order, is unmistakable. Students from higher-income backgrounds leverage these resources, significantly contributing to their cultural capital and academic performance, while their resource-deprived peers face hard-to-overcome challenges. Here parental involvement is an essential conduit between cultural capital and academic success, with parental familiarity, active engagement and advocacy significantly impacting children's intellectual well-being. All the same, hurdles encountered by parents from lower socioeconomic backgrounds worsen the educational split. Cultural norms and expectations similarly exercise direct pressure. Whereas middle-class families' cultural values advance academic achievement, dissimilar cultural backgrounds can cause a deficit of cultural capital. Language and communication skills, inherent features of cultural capital, further augment

disparities, giving prominence to the relevance of this aspect in educational achievement.

Ultimately, the comprehensive analysis of these factors underscores cultural capital's central role in shaping educational inequalities. Addressing these disparities requires a multifaceted approach that guarantees equitable access to resources, encourages parental involvement, acknowledges diverse cultural perspectives, and fosters language and communication development. In constructing such an educational landscape, policymakers and educators can pave the way for a future where every student possesses the vital cultural capital needed to thrive.

Based upon the preceding discourse, the ensuing recommendation emerges as a means to lighten the existing inequities within the American educational field:

Equitable Resource Allocation and Access: To guarantee that schools in economically disadvantaged areas get critical educational resources, including books, technology, and enrichment activities, launching targeted funding mechanisms is imperative. Moreover, it is critical to nurture community partnerships aggressively, aligned with promoting the accessibility of tutoring services and after-school programs, especially in places where access to significant resources is limited. Initiatives focused on educating parents from lower socioeconomic backgrounds about the importance of robust engagement in their children's education should also be applied.

Parental Involvement and Engagement Programs: Initiatives focused on enlightening parents from lower socioeconomic backgrounds about the relevance of vigorous engagement in their children's education should be applied. Besides, creating user-friendly online platforms can empower parents to access and engage with educational materials and progress reports easily. The platforms must be carefully crafted to stimulate durable interaction between parents and teachers.

Culturally Responsive Education: The development of culturally inclusive curricula that recognize and respect the diverse backgrounds and experiences of students is essential. These curricula should challenge prevailing educational norms while fostering inclusivity. Additionally, offering professional development opportunities for teachers to enhance their cultural competence can effectively engage students from different backgrounds.

Language and Communication Support: Language development programs should be accessible to offer targeted assistance for students with reduced adeptness. This can, among other things, cover specialized language courses and bilingual education choices. To accomplish this goal leveraging technology to provide language and communication skill-building resources to empower students to expand their written expression and verbal fluency is critical.

Early Intervention and Support: The application of all-rounded early intervention programs is paramount to detect and fruitfully deal with academic challenges initially. These programs guarantee that students obtain the necessary assistance to thrive. Moreover, peer support initiatives and mentorship can provide appropriate advice and support to students from disadvantaged backgrounds, ultimately promoting inspiration and a sense of fit-in.

Data-Driven Decision-Making: To reinforce the intellectual well-being of all students, it is imperative to regularly collect and analyze data on socio-economic status, student performance, and cultural background. These processes help educators and administrators to identify trends and areas that require targeted interventions. Data should be utilized to craft educational policies and programs that effectively address the specific needs and challenges faced by students with lower cultural capital.

Teacher Training and Professional Development: To identify and effectively deal with the impact of cultural capital on educational outcomes, educators should go through continuing training. This prepares them to craft teaching strategies

to accommodate varied students with different backgrounds. Emboldening partnerships among educators allow for the sharing of successful practices and resources that stimulate cultural capital augmentation.

Collaboration with Community Organizations: Collaborating with community organizations, local businesses, and non-profits can set a precedent in the construction of mentorship, scholarship opportunities, and internships. These opportunities open students' eyes to varied cultural experiences and add to the progress of their cultural capital.

By implementing these policy recommendations, educators and policymakers can, in concert, alleviate the impacts of cultural capital differences. These efforts, in the long run, pave the way for a more inclusive and equitable educational milieu that energizes all students to reach their full potential.

Conclusion

Pierre Bourdieu's polyangular perspective introduces various concepts relevant to analyzing social inequality. These concepts include habitus, field, capital, symbolic violence, and doxa. Of particular significance is Bourdieu's expanded understanding of capital, which aims to rectify the reductionist economism often associated with traditional economic perspectives. By acknowledging the existence of varied forms of capital, including economic, social, cultural, and symbolic, Bourdieu's theoretical perspective recognizes the multidimensional nature of constructing and reinforcing social stratification.

By applying Bourdieu's theory to examine inequality within the United States, scholars have gained a more nuanced comprehension of the complex interplay between varied forms of capital and the societal processes that perpetuate the perseverance of inequality. This understanding critically informs efforts to address and mitigate inequality by promoting equitable access to resources, challenging dominant cultural norms, fostering social connections and networks, and creating policies that aim to dismantle systems of symbolic domination.

The studies reviewed in this chapter attest to the heuristic value of Bourdieu's theory to the understanding of inequality within the American educational order.

DiMaggio's (1982) study, "Cultural Capital and School Success," investigated how participation in high-status cultural activities conditions academic achievement among US high school students. Data based on quantitative research, the study brings to our attention the considerable bond between cultural capital and higher grades, highlighting its independent role in shaping academic success transcending socioeconomic factors. The finding underlines the need to appreciate and advance varied cultural engagement in education.

In their study "Recent Trends in Income, Racial, and Ethnic School Readiness Gaps at Kindergarten Entry," Sean F. Reardon and Ximena A. Portilla (2016) examine growing differences among US kindergarteners. They find evolving income-based gaps over two decades, with high-income children exhibiting advanced skills in contrast to low-income peers who are lagging behind. Racial and ethnic differences further underscore imbalanced access to resources and early education. The study reminds both administrators and educators of the need for focused policies dealing with challenges encountered by minority children from low-income backgrounds. Emphasizing high-quality early education while at the same time confronting systemic racism to bridge readiness gaps are clearly implicated in the findings of the study.

Annette Lareau's study (2003), "Unequal Childhoods," delves into how social class and race mold family dynamics and parenting styles, thereby having an important consequence on children's education. Two diverging styles, "concerted cultivation" and "natural growth", have noteworthy end products. Middle-class children have the advantage of acquiring skills and cultural knowledge, whereas working-class kids face challenges because of limited resources and incompatible norms. The study underscores how schools perpetuate inequalities and emphasizes the need for policies to connect resource gaps and take into consideration family dynamics for equitable education.

From these studies, we learn that the American education system is multifaceted and calls for targeted funding mechanisms to ensure economically disadvantaged schools access vital educational resources. Emphasizing community partnerships is crucial, particularly in areas lacking essential resources, alongside the facilitation of after-school programs and tutoring services. Initiatives should focus on educating parents from lower socioeconomic backgrounds about active engagement in their children's education, supported by user-friendly online platforms. Culturally inclusive curricula that challenge norms while respecting diverse backgrounds are vital, as is professional development for teachers to enhance cultural competence. Language support programs, early interventions, data-driven decision-making, teacher training, and collaboration with community organizations contribute to mitigating cultural capital disparities, fostering a more inclusive and equitable educational environment for all students to thrive. In conclusion, addressing the disparities within the American education system requires a significant attention to be placed on the impact of cultural capital, or its absence, in students' backgrounds entailing the necessity of not just resocialization efforts but also active and all-rounded policy interventions.

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Environmental Inequality and Justice: Four Decades of Scholarship and Activism

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Introduction

In summer of 1978, Robert Burns and Robert E. Ward, Jr. illegally dumped 31,000 gallons of chemically toxic oil onto rural roads in the U.S. state of North Carolina. After convicting Burns and Ward, it was the state's responsibility to dispose of polychlorinated biphenyls (or PCBs) contained in the polluted soil. This highly carcinogenic waste would ultimately be dumped, by the state, into a new 150-acre landfill located in Warren County, a poor and majority African American county near the site of the original crime. Local residents vocally opposed this plan. The resulting justice campaign against the newly proposed landfill is often cited as the beginning of the modern U.S. environmental justice movement—a movement that inspired academics and activists alike to investigate how social inequalities, especially income and race, are linked to unequal exposure to environmental hazards.

Following the Warren County incident, research flourished linking race- and class-based hierarchies to environmental hazard exposure. New terms such as environmental inequality, environmental justice, and environmental racism were discussed and debated (Holifield, 2001). This new body

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of scholarly work called out environmental racism as a form of structural racism referring to “any policy, practice, or directive that differentially affects or disadvantages (whether intended or unintended) individuals, groups, or communities based on race or color” (Bullard, 1993b: 451). More recent research, however, prefers the term environmental inequality as it encompasses environmental impacts related to gender, immigration status, class, nationality and the intersections of these factors (Sze and London, 2008).

The resulting research was not only interdisciplinary but also stemmed from organizations outside academia including social movement organizations. For example, a fundamental early study in environmental justice scholarship was conducted by the United Church of Christ Commission for Racial Justice (Chavis and Lee, 1987). Citing the Warren County incident as motivation, the UCC Commission (1987) issued a national report which found that racial and ethnic minorities in the U.S. were disproportionately burdened with hazardous waste treatment, storage, and disposal facilities (TSDFs). Similarly motivated, United States General Accounting Office (1983) examined demographics near large commercial landfills finding three of the four were located in predominantly African American communities. Similarly, activists at the First National People of Color Environmental Leadership Summit in 1991 outlined principles of environmental justice including affirming the “fundamental right to political, economic, cultural and environmental self-determination of all peoples” and demanding an end to “production of all toxins, hazardous wastes, and radioactive materials, and that all past and current producers be held strictly accountable to the people for detoxification and the containment at the point of production” (UCC.org 2023). This language, developed by activists, has been used as a foundation for environmental justice scholarship including Agyeman’s (2005) development of just sustainability -a term that combines elements of environmental sustainability and social justice. A wide array of academic studies built on these early environmental justice

foundations. Touching on various aspects of class and racial hierarchies, environmental management, social movements, politics, law, and urban planning research flourished in several disciplines. Among the most notable were sociology, geography, economics, and political science (Been, 1994; Bullard, 1990; Cutter, 1995; Hurley, 1995; Kraft and Scheberle, 1995; Pinderhughes, 1996).

Since the inception of environmental inequality as a field of study, this scholarship has grown tremendously and has branched out in too many ways to cover in any single literature review. These newer bodies of research draw (sometimes substantially) from other fields of scholarship adding invaluable insights and nuance to the field. Some of the bodies of research in this literature include scholarship with roots in the sociological study of social movements and organizations (Pellow, 2007; Perkins, 2022; Taylor, 2000); a related body of research on food justice (Sbicca, 2018); a body of global scholarship drawing on political economic theories to explain environmental inequality between nations (Austin, 2012; Frey, 2003; Jorgenson, Dick and Mahutga, 2007), research on environmental justice and the carceral state (Opsal et al., 2022), a body of public health scholarship examining the health effects stemming from environmental inequalities (Hill et al., 2019; Jorgenson et al., 2020; Morello-Frosch, Pastor Jr and Sadd, 2002), and a sizeable literature on social inequalities related to climate change -both its creation as a problem and inequalities related to the effects of climate change (Harlan et al., 2015; Roberts and Parks, 2006). This review begins with a summary of early environmental inequality research and highlights recent scholarship on Environmental Justice (EJ) movements, public health, and food justice which all have some origin in this early work on environmental inequality, racism, and (in)justice.

Early Research: Is Race a Factor?

The earliest publications in environmental inequality scholarship debated the pattern of uneven environmental

hazards faced by minority and low-income communities in the U.S. One of the common threads in this scholarship was that it primarily focused on locally unwanted land uses (LULUs) such as toxic waste facilities and chemical manufacturing (Been, 1994; Bullard, 1993a; Burke, 1993; Lake, 1996; Lober, 1996). In his seminal work, Bullard (1990) characterizes uneven development in the American South in which some communities have experienced economic growth and prosperity and others have become “‘sacrifice zones’, a sump for the rest of the nation’s toxic waste” (1990: 97). He argues that throughout the country, wealthier (and majority white) communities were engaged in local not-in-my-backyard (NIMBY) political actions to ensure that toxic waste facilities were not built nearby. This occurred at the expense of these facilities being located in less politically powerful black communities. In similar studies, Hird (1993) examines 800 superfund sites—so called because of the federal government’s program aimed at cleaning up these heavily polluted areas—finding they were more likely to be located in counties with higher-than-average minority populations; and Burke (1993) examining Los Angeles County, found that lower income and minority communities are more likely to host toxic waste facilities. These works demonstrating this pattern of uneven hazard distribution marked the beginning of a lengthy academic debate. Beginning in the 1990s and lasting roughly two decades, scholars debated whether a community’s racial composition or economic characteristics were primarily responsible for its relative exposure to environmental hazards (Anderton, Anderson, Oakes et al., 1994; Ash and Fetter, 2004; Atlas, 2002; Bowen, 2002; Morello-Frosch, Pastor and Sadd, 2001; Morello-Frosch et al., 2001).

The debate over whether race or income was a more important factor was carried out mainly by quantitative researchers. Many found that, independent of economic effects, racial composition of a community helped explain the presence of hazardous waste or other toxins (Ash and Fetter, 2004; Morello-Frosch et al., 2001; Pollock and Vittas, 1995).

Others found no evidence or partial evidence for a race effect, and tended to conclude that class effects were the more important driver of unequal environmental hazards exposure (Anderton, Anderson, Oakes et al., 1994; Derezinski, Lacy and Stretesky, 2003). While most social scientists at the time tended to agree that sufficient evidence existed to claim race and/or income are at least a factor contributing to environmental hazard exposure, others such as Atlas (2002) found that no evidence of income or race-based inequalities exist—positing that most hazardous waste generating sites mainly exist in unpopulated areas. That said, much of the debate centered on methodological and technical details of quantitative research such as comparing the predictive power of race or income in multivariate regression models, demonstrating the lack of significance in regression models when including certain variables, or using larger or smaller units of analysis (Pulido, 1996).

Ultimately, the work of Downey and Hawkins (2008), building on criticisms of Pulido (1996) and Downey (1998), put an end to the debate over whether race is an important factor, by pointing out that isolating racial inequality from class formation ignores important theoretical connections between race and class formation in the United States. Drawing from well-established social science literature on the relationship between political economy, class, and race Pulido argues that,

[w]hile it may be possible statistically to separate and analyze “racial” and income groups, such a procedure does not necessarily help us understand the racialized nature of our economy, including the process of class formation, the division of labor, and poverty. (1996: 149)

Thus, Pulido (1996) explains that the entire project of debating class- and race-driven discrimination is moot because the class and race do not exist independently: racism informs the class structure of U.S. society. Building on this idea, Downey and Hawkins (2008) conduct a quantitative analysis

showing that race and income interact to produce environmental risks: amongst their complicated (and many) findings, they conclude that whites, blacks, and Hispanics with similar incomes live in neighborhoods of dissimilar environmental quality and that increases in household and neighborhood income levels are more strongly associated with improved environmental quality in black households and neighborhoods. Statistically, owing to Downey and Hawkins (2008) and theoretically, via the critical work of Pulido (1996), it is safe to say that within the U.S. race and class interact in ways that determine an individuals' and communities level of environmental risk. While the majority of recent scholarship has moved away from simply demonstrating that race is a factor determining the unequal distribution of environmental harms, new quantitative research continues to find ways that race plays an important role in environmental pollution exposure (Jorgenson et al., 2020; Kravitz-Wirtz et al., 2016; Mitchell and Chakraborty, 2018). Thus, the debate over whether race or income is a more important driver of environmental exposure dissipated when researchers agreed that the dichotomous nature of the question lacked theoretical motivation. Alongside this debate, Environmental Justice scholarship proliferated. Once the debate was mostly cast aside, EJ scholarship flourished in sociology circles.

The Environmental Justice Movement: From Local Toxins to Climate Justice

While academics debated the existence of environmental racism, the Environmental Justice movement and its discourse grew into a global phenomenon. Since its inception after the Warren County incident, the EJ movement has thought about the natural environment as including the places we “live, work, and play” and been keenly aware of the links between environmental destruction and the marginalization of people of color and low-income communities (Novotny, 2000). In the past several decades, the movement's discourses expanded to include an wider awareness of social-ecological

interconnectedness including issues of self-determination, globalization and political economic issues, food and energy justice, and climate change (Agyeman, 2005; Taylor, 2000).

While the EJ movement expanded its conceptions of environmental justice, EJ research expanded in parallel. Academics studying the movement challenged their own definitions of environmental justice (Holifield, Porter, and Walker, 2009), expanded the variety of research methods they utilized (Gutiérrez, Powell, and Pendergrast, 2021; Harrison, 2011), and explored a variety of environmental and social topics that were already of interest to movement activists (Bullard and Wright, 2009; Pellow, 2007; Taylor and Ard, 2015b). Scholars, for example, explored links between social hierarchies and natural disaster outcomes (Bullard and Wright, 2009, 2012; Freudenburg et al., 2008), food justice (Alkon and Agyeman, 2011; Sbicca and Myers, 2017; Taylor and Ard, 2015a), and climate change (Schlosberg and Collins, 2014). Researchers also explored the failed (or partially successful) implementation of environmental justice concerns in governance (Bullock, Ard and Saalman, 2018; Harrison, 2019), and the globalization of the environmental justice movement (Pellow, 2007).

One of the main currents in the academic study of the EJ movement has been to trace, analyze, and criticize the EJ movement's discourses as well as competing environmental frames (Agyeman, 2005; Lynch, 1993; Taylor, 2000). Lynch (1993) finds, among other differences, that Latinos' vision of environmental problem solving differs from mainstream conceptions in that they rely less on technology as a solution instead favoring changes in social dynamics (such as reliance on resource extraction) to solve problems. Similarly, Harrison (2011) explores differences in activists' notions of justice compared to those held by the state and agriculture industry. The latter notions of justice, she argues, tend to be neoliberal and are partially responsible for marginalizing workers and immigrant communities of color exposed to toxic pesticide drift in California's Central Valley. Agyeman (2005), in another study examining environmental discourses, critiques the

UN and municipal notions of environmental sustainability claiming they ignore the EJ movement's knowledge of the interconnectedness of social equity and environmental problems; furthermore, he challenges them to integrate social equity and environmental sustainability as a form of just sustainability.

Like analyzing relevant discourses, another substantial theme in this scholarship highlights the role of activists in combating environmental inequities (Agyeman, 2005; Bullard and Wright, 2009; Sbicca and Myers, 2017). Coburn (2002) for example examines how low-income and people of color in Brooklyn, NY engage in community-based participatory research to address the communities' high rates of asthma from neighborhood air pollution and subsistence anglers consumption of toxic fish exposing anglers and their families to cadmium, lead, PCBs, DDT, and mercury. In addition to demonstrating how EJ organizations view the world and how they are changing it, the variety of environmental injustices studied in this body of research, demonstrate the diverse forms of environmental injustice the EJ movement challenges.

Perhaps the most quintessential issue demonstrating the growth and diversification of the environmental justice movement is its expansion into global climate justice (Harlan et al., 2015; Schlosberg and Collins, 2014). The influence of the environmental justice movement on climate change discourse is made particularly clear when viewed in contrast to the more elite environmental NGOs. Each group, elite NGOs and EJ movement organizations, holds their own socially-constructed view of the environment itself (Lynch, 1993; Schlosberg and Collins, 2014). Elite conceptions tend to focus on the environment as a place absent of people—dichotomizing nature and humanity as separate and exclusive spheres. On the other hand, Environmental Justice activists (like many EJ researchers) view the environment as a place where people “live, work, and play” (Lynch, 1993; Novotny, 2000; Schlosberg and Collins, 2014). Global climate justice groups argue that

climate change is a justice issue because climate change is driven by social inequalities (especially in consumption and production), it disproportionately burdens poorer nations and minority groups, and climate change mitigation policies have unequal consequences (Harlan et al., 2015). For activists concerned with social inequalities, ecological problems related to climate change marked a global extension of issues they were already deeply mired in. Amongst organizations and actors involved in advocating for solutions to climate change, there are clear and distinct voices that come from the well-funded, elite organizations and grassroots environmental justice activists concerned with the interrelations of social and environmental issues.

Environmental Inequity and Health: Finding Empirical Proof and Governing with Uncertainty

A logical next step after affirming unequal environmental hazards exposure, sociologists, public health researchers, and other scholars also researched links between environmental inequalities and resultant health disparities. However, scientific certainty and consensus linking specific toxins to specific health outcomes is a difficult task that can take years or decades if it is even achievable at all. Working for justice while dealing with chronic toxins exposure and scientific uncertainty in health research, EJ activists and environmental inequality researchers often promote the precautionary principle as a method of governing even when dealing with uncertainty (Harrison, 2011, Morello-Frosch et al., 2002). Though there is ample uncertainty about the specific health ramification of toxins exposure, there has been some research that definitively links environmental inequalities to health inequalities.

Health consequences of ambient air pollution are perhaps the best documented cases of health inequity that have been directly and empirically tied to environmental inequality. This body of literature focuses mainly on class and majority-racial/ethnic minority communities and calculates disparities in actual health outcomes and elevated risk to human health

(Brulle and Pellow, 2006; Cushing et al., 2015; Hill et al., 2019; Jorgenson et al., 2020; Morello-Frosch et al., 2001). Scholars have found that residential segregation by race is associated with higher levels of air pollution exposure risk (Kravitz-Wirtz et al., 2016), that school-aged black and Hispanic children are at increased risk of cancer (Pastor, Sadd and Morello-Frosch, 2002), and the well-documented racial disparities in asthma prevalence may be partially due to air pollution exposure (Brown et al., 2003; Khan et al., 2021). Similarly, Hill et al. (2019) and Jorgensen et al. (2020) demonstrate that air pollutant exposure (PM_{2.5}) is linked to reduced life expectancy in the United States. Unlike air pollution exposure however, other forms of environmental hazards are more difficult to empirically link. In many of these cases, EJ activists and inequality researchers focus on governance policies that can keep societies safe in the face of scientific uncertainty (Brulle and Pellow, 2006; Harrison, 2011; Morello-Frosch et al., 2002).

In the U.S., governments charged with regulating environmental toxins, pollution, etc. assume that without empirical evidence to show otherwise, chemicals, synthetic products, and potentially harmful production processes are assumed to be safe (Harrison, 2011; Morello-Frosch et al., 2002). This assumption is especially problematic because scientific certainty that a single chemical produces a particular health outcome is often elusive. These empirical connections are elusive partly because of necessary and well-justified ethics that guide medical research (for example by preventing research which intentionally exposes humans to toxins) and partly because people's lived experiences differ from laboratory settings in important ways (for example farmworker communities are often exposed to combinations of tens or hundreds of pesticides rather than a single chemical which could be the subject of a scientific study) (Harrison, 2011). As a result of this uncertainty, researchers and activists have critiqued regulatory practices in the U.S. and globally as upholding unreasonable scientific standards that disproportionately put disadvantaged communities at risk (Harrison, 2011; Gareau, 2015)

In contrast to assuming chemicals, production practices, etc. are safe until proven otherwise, EJ scholars and activists propose shifting the burden of proof regarding a chemical's safety onto those who wish to utilize them for commercial or other purposes (Morello-Frosch et al., 2002: 50). Kriebel et al. (2001: 872-73) summarize the precautionary principle's logic this way: "producers of PVC products have argued that there is no evidence of harm from use of the products, given 40 years of use without apparent ill effects. There is a flaw in this reasoning however, because the absence of evidence of harm is not the same thing as evidence of the absence of harm". This line of scholarship has criticized the U.S. federal government for upholding the burden of proof-of-harm rather than using precaution when regulating potential environmental harms and even provided cases studies as a sort of governance tool-kit for reshaping environmental regulations to bring about environmental justice (Myers and Raffensperger, 2006; Whiteside, 2006).

From the early work of the 1990s demonstrating uneven patterns of environmental hazards, it was a logical step to proceed with empirically demonstrating unequal health outcomes that stem from these environmental harms. This line of research has made some progress (for example in demonstrating acute hazards related to air quality) but has made equally significant advances in highlighting a just regulatory framework in the face of empirical uncertainty. This alternate path promotes the precautionary principle. In addition to its foray into public health, environmental inequality and justice research has also broadened to include in depth examinations of unequal access to healthy and nutritious foods and the social movements that seek to address this inequality (Alkon and Agyeman, 2011; Alkon and Norgaard, 2009; Garth and Reese, 2020; Sbicca, 2018; Taylor and Ard, 2015b).

Food Inequality and Justice

Everyone eats. But not everyone in the United States enjoys access to healthy and nutritious foods—especially if you

are from a low-income minority community (Berg, 2011). The food justice movement highlights one of the main ways social inequalities interact with the natural environment: how we produce, consume and distribute food (McClintock, 2011, Minkoff-Zern et al., 2011; Taylor, 2018, Myers and Caruso, 2016). This research documents the food justice movement's overlaps with the broader environmental justice movement and its dissimilarities with the more well-known food movement in the United States.

Like the broader environmental justice movement, food justice activists and scholars recognize that the food system itself is a racial project that structurally disadvantages people of color and low-income communities, denying them access to healthy, affordable, and culturally appropriate foods (Alkon and Agyeman, 2011). For example, low-income groups and racial minorities are more likely to rely on access to fast foods, resulting in a higher diet-related disease rates including diabetes (Babey et al., 2008). This stems partially from redlining and corporate lobbying. Redlining prevented economic development in minority neighborhoods resulting in disinvestment in food retail and fewer options for healthier foods; and, similarly, wealthy fast-food corporations lobbied to avoid policies intended to educate consumers on the nutritional quality of their food (Sbicca, 2018: 29). Calling out food injustices in terms of social structures that define class and race is the defining overlap between the environmental and food justice movements. This focus on race, class, and social structure is also what makes the food justice movement distinct from what is sometimes called the "food movement" or "locavore" movement that calls out industrial agriculture for harmful environmental practices that produce less healthy food.

The U.S. food movement, which in the last two decades has become widely popular, promotes eating locally produced organic food. This movement aims to reduce the use of synthetic pesticides and fertilizers that are potentially harmful to consumers (and pollute farmlands) as well as address the

carbon dioxide emissions produced from shipping food long distances. Some of the movement's growth is owed to popular writers like Michael Pollan (2006) and Barbara Kingsolver (2009) whose books highlight the joys of eating healthy, locally produced food while also deriding the perils of industrial agriculture. In general, the food movement offers a reasonable critique of industrial agriculture: its reliance on synthetic inputs, unethical treatment of food animals, and detrimental impacts on the earth's atmosphere through its contributions to greenhouse gases and global warming; however, the movement falls short of including social inequalities in their critique of the food system—such as the case of migrant farm workers or exclusion of low-income communities' concerns about access to healthy food (Alkon and Agyeman, 2011: 1-5; Sbicca, 2018).

By contrast, the food justice movement has roots in struggles for social justice that include immigration, economic justice, prison reform, and anti-colonial indigenous movements (Sbicca, 2018). Like the environmental justice movement, it shares a structural understanding that social inequalities are connected and activists should pay attention to recognition, process, procedure, and outcome in order to create a more just world (Agyeman, 2005; Schlosberg, 2009).

Conclusion

Over the last several decades, environmental inequality has become an important aspect of the U.S. struggle for social justice. The environmental justice movement flourished after citizens began to fight back against dumping of hazardous waste in low-income black communities. Since then, the movement spawned academic interest in environmental racism and environmental inequalities have become a major field of study. Scholars have examined the environmental justice movement itself, analyzing its discourses and basic tenants, they have made significant progress tracing the evolution of the EJ movement from the civil rights movement to the early anti-toxins movements of the 1980s and into the

modern struggles for environmental justice including climate justice. Other research has sought to empirically link environmental and health inequalities and has made considerable progress connecting unequal air pollution exposure to health inequalities. Likewise, scholars have championed the precautionary principle as a just path toward governing in the absence of scientific uncertainty surrounding health. Finally, EJ scholars have also documented the growing food justice movement which shares its roots with environmental justice activism and is distinct from the U.S. locavore food movement. Though the movement and related scholarship has grown, the justice ideology binds this research and these various movements together.

The ideology defining environmental justice can perhaps best be summed up as a view the natural environment is not separate from human societies and includes where we live, work, and play; as such, just environmental protection necessarily embraces social justice as well as protection of non-human species and their surrounding environment. This coalescence—of social justice and environmental protection—holds a unique place in academia in that these defining tenets do not come from classical theorists or well-known studies, but rather, from the voices of front-line environmental justice activists. Perhaps this should be unsurprising since both the modern EJ movement and environmental inequality research share a common origin in the fight against dumping toxic waste in Warren County, NC.

As for the EJ movement's impact on the Warren County incident, the site was eventually declared toxin free in 2004, more than two decades after the original crime (NCDENR, 2011). Amongst the locals, however, questions remain about the completeness of the detoxification especially whether PCBs could have leaked into nearby waterways and contaminated surrounding areas (Bullard, 2004). That said, detoxification would not have happened without activists' resilience and ability to mobilize resources: they protested for months and faced mass arrests for laying down on the road to block

trucks headed to the dump site (McGurty, 2009). In the end, they not only achieved detoxification, but created a movement for environmental justice that would become a major focus of academic research and a model of justice for activists around the globe.

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Everyday Neoliberalism, Perceptions of Inequalities and Social Positions through the Lens of Credit in Chile

Alejandro Marambio-Tapia¹

Introduction

After the coup d'état in Chile in 1973, a structural adjustment began, including commodifying and privatising health services, healthcare, higher education, water, housing, and other public services. The deregulation of markets led to an expansion of the financial sector and the financialisation of health, education, and pensions, which increased access to credit and financial instruments. Alongside this process continued until the mid-1980s, the rise and sophistication of consumption standards in the 1980s and 1990s led to the emergence of a consumer culture due to partly unequal income growth but mainly the expansion of credit to the lower classes.

In 2019, just before the pandemic, the average monthly income in Chile was 1,141 Euro, while the median income was much lower at 719 Euro. The Gini co-efficient measuring the degree of income inequality remained high. Since 1973, this co-efficient has risen steadily, reaching a peak of 0.59 between 1987 and 1990. In 2013, it was 0.50, which is still

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considered high, and the median income of the top decile was 29.1 times higher than the median income of the bottom decile. Comparing the 1992 and 2002 censuses, the proportion of households owning their home reached 72.6 per cent. The number of people living with basic facilities including electricity, water, sewerage, shower, gas increased from 61.1 per cent to 79.1 per cent. Even looking at the 2017 Socio-Economic Characterisation Survey, the remarkable penetration of durable goods makes irrelevant differences in ownership of refrigerators, televisions, mobile phones, and so forth. This is how the so-called “democratisation of consumption” looks like.

The number of people living in income-based poverty fell from 38.6 percent in 1990 to 11.7 percent in 2015, rising to 13.8 percent in 2019 (Ministry of Social Development, 2020). The country reached the highest level in Latin America in the Human Development Index and GDP per capita. However, there is a hidden, disguised precariousness alongside this story. While poverty has changed in Chile quantitatively, the consumer society has modified its image and the subjective understanding of this idea (Villaseca and Padópulos, 2011). The old image based on scarcity evolved into one characterised by powerlessness, restriction and invisibility.

The state in Chile retrenchment started in the 1970s made credit markets a “public policy” (González-López, 2021). This way, Chilean households naturalised the use of market and credit to make ends meet and to provide themselves with all those educational, health, and housing needs that the state is no longer taking care of. Stagnation in wages could be a solid reason for being indebted. GDP per capita in Chile is around USD 23,000 per year, and it is considered a higher income globally; nevertheless, due to a sharp disparity in wealth and income distribution, around 70 percent of the population live with less than USD 14,000. Moreover, many wage earners only reach a minimum wage -set by law- of USD 4,300 per year. Whereas wages have increased roughly 8 percent in the last

decade, the income-debt ratio per household increased more than 60 percent.

Kus and Fan (2015) demonstrate how income inequality and the use of credit are correlated for the alliance of OECD countries, which Chile joined in 2010. The expansion of credit markets has been relevant to the growing income inequality. Consumption society creates the conditions for a culture of never-ending needs for positional goods, conspicuous consumption, and symbolic consumption. As salaries have stagnated or at least did not increase in the same way as prices (Harvey, 2007; Marambio-Tapia, 2022) from the 1970s onwards, the dependence on credit has become higher to fulfil all those different consumption needs, ranging from this positional, conspicuous consumption to this material and basic needs. The “democratisation of credit” developed during the 1990s and 2000s (Marambio-Tapia, 2021) changed the perception of inequalities since it also comprehends the sense of social mobility (Marambio-Tapia, 2017) and the blurring of class differences to the extent some individuals assess the social stratification structure from the ownership of some goods (Kus, 2013) or to the adoption of lifestyles.

Deregulated credit markets also mean that credit can be expensive and lead to income inequality. The boost in purchasing power due to the expansion of credit has a consequence for growing inequality in Chilean society. Most of the Chilean economic growth during the 1980s, 1990s, and 2000s has benefited the top layers of society in terms of income. Growing income inequality has been a regular feature of the financialisation era which can be addressed as a stage of capitalism where financial capital plays a significant role in global and domestic economies. It also encompasses a growing dependence of households on financial institutions to address their everyday activities (Martin, 2002; Marambio-Tapia, 2022). The size of the financial sector has grown while the industrial sector is decaying. Global financial governance has also enhanced the power of the financial industry.

Rising prices came with the privatisation of welfare over the last decades, which has impacted the monthly household budget. As stated before, households must allocate plenty of resources for primary, secondary, and higher education; health insurance; housing; and pensions. Not only the upper and middle-classes are paying education fees; around 65 percent of school attendance is in paid schools, and about 80 percent of higher education students need a loan to pay their fees. New individual pension schemes did not work as promised in the 1980s; therefore, forty years later, a growing number of retired people are falling into poverty and depend heavily on credit to afford their needs.

Taking these developments into account and critically evaluating factual information briefly presented above, this chapter will pursue its discussion and present the case that it focuses in three sections. First of all, it gives some socio-historical features of the last 50 years of Chilean society, focusing on the early setting of neoliberalism in the 1970s as a set of public policies and ideological and cultural framework. Additionally, it demonstrates how unequal Chilean society has become by embracing financialisation. Following this, it focuses on how, within this neoliberal financialised capitalism, the expansion of credit produced a sort of “democratisation of consumption” with crucial effects on lower and middle-income groups of society. Afterward, it turns to explain how the expansion of credit impacted the understanding of social structures and social mobility as well as the interpretation of inequalities in Chilean society, mainly by penetrating everyday economies and conforming a mixture of calculating and moral subjectivities.

Financialisation and Credit Expansion in Chile: Department Stores and Supermarkets as Welfare Providers

In this section, I provide evidence about the particular expansion of credit in Chile, led by department stores and supermarkets - and focus on the previously unbanked groups

such as lower-income households, retired people, students, and housewives who are in fact vast sociological groups of the Chilean population. Around 70 percent of Chilean households are indebted, either to banks or department stores (Banco Central, 2021). Most of them are kept to date and are also heavy users of credit cards, payday loans, and consumer credit. First explanations relate this condition to growing individual consumerism; nonetheless, structural conditions in the economy, such as low wages, high prices, and credit availability, play a fundamental role in the process.

A timid bank-driven credit expansion happened in the late 1970s and the 1980s. Nonetheless, throughout the middle of the 1990s, new lenders entered, and new social groups became credit subjects. These new institutional lenders involving department stores, supermarkets, and other retailers make their financial innovation oriented to groups habitually not targeted for credit, such as low-income groups, women on unpaid house labour, retired people, and students.

This so-called “democratisation of credit” was led by the retail sector. A brief overview of its particular history in Chile accounts for two relevant milestones. During the 1980s, significant retailers started to move their stores to large shopping malls, becoming partners in the construction and exploitation of the new shopping malls and then emerging as real estate developers. Department stores became the core of firms and holdings that concentrated the retail market. Later, diversification and concentration were based on the following scheme: supermarket + home improvement store + department store, and extensions to pharmacies, travel agencies, insurance sales, and finally, banks.

Chilean society has been the leader in store card ratio per person in the entire Americas, with nearly one card per inhabitant. There are roughly two store cards for every bank credit card, and more than 5 million are typically used monthly (CMF, 2020). This model has been exported to the rest of Latin America, leading to two leading retail holdings, namely *Cencosud* and *Falabella*, becoming two of the most significant 30

retailers worldwide from 2013 onwards (Cámara de Comercio de Santiago, 2016). The Chilean economy has also been acknowledged as one of the most banking-based environments of developing countries. One of its main innovations is *Cuenta RUT*, a debit card account issued by the state-owned bank² using as account number the National Identity Card number [RUT, in Spanish]. So, everyone in Chile potentially has one, including recent waves of South American migrants. If department stores contributed to the “democratisation of credit,” *Cuenta Rut* made its way with plastic money and electronic transactions, representing the financialisation by the State. By the end of the twentieth century, the most crucial state-owned bank device was a savings account in the form of a notebook. Today is the *Cuenta Rut* card, which allows everyone to be banked.

Retail banking is a vital area of the business of big retailers. Retail managers have admitted that their business is more financial than commercial, in tune with financialisation. In this regard, they have been quite innovative in offering attached benefits to using their credit cards, taking advantage of their position as “retail” and “banking”. Credit cards are more profitable than sales. Retailers sometimes use customer debt as an asset to create an artificial market value and generate outstanding balances aimed at shareholders and the stock market. Various products are being offered at lower prices under the condition of using in-store cards, even in compulsory fixed-installment mode. Card membership also allows retailers to provide additional services, both non-financial such as weddings and holidays, as well as financial services such as car loans, unemployment insurance, and life and health insurances.

The social diversification of credit started with the “sowing” of consumers by department stores (Ossandón, 2017) through a fast-track store card awarding to lower-income

² This state-owned bank, *BancoEstado*, is run by the same market rules of any bank, and the main difference is it has branches along 2,653 miles of Chilean territory, including Eastern Island.

consumers. Besides its commercial implication, this “sowing” helped create information about customers, which department stores keep as assets, unlike banks, which must make public records. Credit applications are not quite demanding though; people acknowledge this feature as one of the crucial advantages of using store cards. In department stores, the creditor can purchase, get credit and pay outstanding balances at once. People probably went to the shop only for one of these and ended up doing all. They can find it more challenging to pop into a bank to get a loan, which is open Monday to Friday from 9 am to 2 pm, instead of a department store, which usually opens from Monday to Sunday from 9 am to 9 pm. In their words, the shift of retailers to finance has helped to diversify credit sources and to deepen them substantively. They are sure about their support for Chilean society since they have allowed lower-income groups to access durable consumer goods and a better life.

One of the main differences between banks and financial retail as credit suppliers is the ease to access to credit for groups usually excluded by banks. The firms take advantage of the lower financial training of these groups and the anxiety for funding, agreeing on long, undecipherable contracts that ordinary people find hard to read and understand. However, this came with higher fees, maximum interest rates, and hidden costs in the form of insurance fees which customers never ask. From the last years of the 2000s, the 22 members of the traditional bank system were joined by almost 80 non-bank sector agents, retail banking, union banks, building societies, and other institutions that started to offer credit. By the 2010s, around 77 percent of the active credit cards are issued by retailers.

The socioeconomic model stems from all of this financialisation for everyday life, and “democratisation of consumption” via expansion of credit makes way for the construction of a “financial consumer” subject, which implies one step further away from the “citizen-consumer” (Cohen, 2004; Jubb, 2007; Trentmann, 2007), and whose main characteristic

is that they must provide for and deal with the social reproduction of life, inserting him or herself into the financial markets under the premise of being a reasonable consumer, “responsible” both for making the economy grow with their demand, for learning to use financial instruments, mainly unsecured credit, for doing what is sensible for material survival, but also for amplifying their acquisition opportunities. In short, not to be a failed consumer who participates in the precarious consumer society without being excluded from the credit market by bankruptcies or defaults. In this scenario, department stores and supermarkets, namely the big retail, have played a leading role in this “democratisation of credit”. This large retailer has widely promoted access to consumer credit and credit cards for lower-income households. It has contributed to this financial consumer incorporating credit in their daily purchasing practices and consumption as well as reproduction projects involving housing, cars, education, home improvements, holidays, dental surgeries, a new mobile phone, food, and clothing. This relationship goes beyond credit, impacts how people shop, value, and budget, and contributes to the disguising of poverty through household equipment and financial inclusion.

The working-class identity, culture, and consciousness, marked by the structural changes of those years, also felt these changes. During the 1990s and 2000s, this identity will see the consolidation of a highly precarious and financialised consumer society (Marambio-Tapia, 2021 and 2023; Pérez-Roa, 2021; Pérez-Roa and Troncoso-Pérez, 2019), a “spurious tertiarisation” that is, the creation of jobs in the service economy, but of low qualification and low formalisation (Kessler and Espinoza, 2003) and a debt society (González-Lopez, 2015). In this scenario, discourses of the “middle class” circulate, from and towards the market, public policies, and the everyday life of these households.

In developed countries, it has been argued that credit helps the middle-class maintain its status (Trumbull, 2012; Burton, 2008; Klein, 1999). Furthermore, it has been argued that there

is less support for distributive measures when credit is regularly relied upon for resources (Kus, 2013). In the following pages, I examine how the latter happened in Chile during the last decades and how this affected the perception of inequalities in two ways: a) the construction of upward social mobility narratives based on the regular use of credit and b) the changing meaning of class differences to the extent that some individuals assess the social stratification structure from the ownership of some goods or to the adoption of lifestyles primarily based on the virtual increasing of the purchasing power due to expansion of credit mentioned earlier.

Everyday Economies, Perceptions of Inequalities and Social Positions through the Lens of Credit

The expansion of credit, including new devices and techniques for purchasing new kinds of goods, has been related to the rise of material culture in consumption. Carruthers and Ariovich (2010) exemplified the growth of the suburban neighbourhoods post-World War II due to the fostering of mortgages by the government; Cohen (2004) speaks of the birth of the shopping mall where credit would be responsible for the push for consumer demand, in an era of low wages but consumer expansion (Harvey, 2007; Trumbull, 2012); the shopping experience, an essential element in the desires of the consumer society (Bauman, 2004) is underpinned by the availability of credit (Edwards, 2000).

The consumption expansion in Chile meant own-property houses, durable goods, new technological devices, and changes in household expenditures (e.g., less gross food, more leisure, more meat, and so forth). If economic growth has much to do with this, credit even more. Credit changed the biography of people and homes. If forty years ago furniture was a once-in-a-lifetime investment, today it can be at any time and place. Credit also turned trivial some consumption, such as electrical appliances, cars, and technological devices, insofar as access to goods and services became massive.

However, this approach does not consider credit expansion as a structural feature that underpins a growing material but less perceived inequality.

Narratives of credit suggest that families on lower and moderate incomes combine moral and social foundations - with market rationalities to cope with credit (Marambio-Tapia, 2021 and 2022). This practical socio-economic rationality is vital in pursuing their social goals while adapting to structural circumstances. It is also a way to embody the neoliberal subjectivities they are immersed in. Credit penetrated the ordinary purchasing and budgeting practices of lower and moderate-income families, so credit became highly normalised for these Chilean households. Their strategies and techniques around credit are constructed in practical and moral terms using both market and non-market frameworks. This strategy is a valuable way to synthesise the material practices, moral discourses, relational practices, and rationalities deployed by the families in their relationship with credit and debt. It is also a practical way to connect the macro structures of debt and financial capitalism with everyday practices of borrowing and budgeting. From this analysis, we can see how families devise their complex methods of financial calculation. They estimate different credit possibilities and elaborate arrangements that involve long-term loans, cash withdrawals on credit, borrowing credit cards from relatives and friends, and buying durable goods on hire purchase from department stores. Simultaneously, they try to synchronise their household budget, considering multiple acquisitions in instalments. Families pay considerable attention to the market as well as mixing, testing, and modifying their practices as they add new information about financial instruments and offers.

Using credit means doing what is needed to achieve goals in neoliberal settings like Chilean society. Credit practices and household economies are about acquiring consumer goods, being integrated, leaving poverty, and gaining respect. Credit is about mobility, self-esteem, and being decent. In any household, economic rationality can be found in emotional,

moral, and relational assumptions and obligations, as well as market rationalities, to the extent that families are exposed to them and deploy different levels of adherence to them through quotidian calculations. People are not necessarily irrational if they do not strictly follow utility-maximising premises, which are empirically put forth by various scholarly sociological works, too (see Arun, 2022a). Instead, people, especially in lower-income families, act sensibly (Van Babel and Sell-Trujillo, 2003) and, to the extent possible, try to deal with the threats and opportunities of economies in a coherent fashion that can sometimes mistakenly be interpreted as “irrational” by outsider observers. In the case of credit and debt, people’s financial rationalities are embedded in and only make sense within the practicalities of everyday life. Looking at what people do when they access credit makes it possible to understand why they are doing it. Credit is a “necessary evil” for families, placing them in a threatening but unavoidable position. This way, it is not the investing subject who emerges, as some accounts of the financialisation of everyday life suggest, but rather a “livelihood manager” whose primary goal is to provide and feed family aspirations to the extent possible, managing credit without causing any harm, or controlling damage when a disaster has happened.

Credit helps analyse the meaning of a “decent life” since it opens the discussion of the concrete living standards that sustain a decent life and how people use strategies to achieve their own conception of a decent life. Heads of households circulate different measures of how much they can squeeze credit to provide for their families, for instance, considering their regular income and credit line. The interviewees perform technical and moral self-discipline. For Paul Langley (2008), a new subjectivity mixes the management of calculations through the knowledge of credit technologies and a conception of responsibility for the risk caused by indebtedness. Credit constituted the condition of access to a good living for the financialisation of consumption. The circulation of credit money drags an ethos of responsibility. The families

think and feel the loans, each day of their lives, as the way to consumption. Abandoning it means abandoning the path to a better life. Once immersed in this economic and moral dynamic, the individuals highlight the responsibility in the payments as a virtue. The financialised economic struggle imposes the moral value of this recognition.

Families run from the collateral effects of neoliberalism, that is, the consequences of socioeconomic inequality and the disintegration of the social fabric; they run from intensive poverty that is invisible to the eyes of the means, of the staging and official aesthetics that the Chilean society has. Class belonging, aspirations, and social goals emerge when the analysis of the practical uses of credit is on the table. The families addressed here identified the use of credit as being part of the “middle class”. These families have experienced precarious upward social mobility, but what is clear to them is that, on top of their hard work, they can and should resort to credit to have a better life than their parents and to give a future to their children. After all, without fully embracing neoliberalism, they must go to the market insofar as the state “does not do a thing for us”. Part of the “middle-class kid” is being indebted since life is expensive. This proposition blurs boundaries between credit as a necessity and as a convenience, synthesising coping strategies, opportunities, and social goals. One side of the story is that households have structural constraints upon their budgetary arrangements, and hence they resort to credit, constructing debt careers. By doing so, they are also reassessing their logic and ethics, eventually adopting and adapting financial instruments according to their values and hierarchies. Credit practices fall in the middle of the encounter between domestic rationalities and subjectivities and conversely shape some of these priorities and goals. The other side of the narrative is that people want to do things one way or another. Higher living standards require credit; it is a matter of agency, of wanting to be better. Credit is necessary to do the things you cannot afford to be

excluded from, so credit has become normalised and is at the core of social inclusion in Chilean society.

Uncertainty in the global society means people seek new forms of stability and social inclusion. Consumption became one of these places where people can find a place to feel safe and non-excluded. Incidentally, consumption access has become crucial, so credit is key for consumption in societies of growing income inequality. This relationship is one of the essential effects of financialisation of consumption and everyday life in neoliberal societies: credit became naturalised, either for positional and identity-seeking consumption or for the material reproduction of life. From a financial point of view, credit allows for the smoothing of income inequalities insofar as it allows access to consumption without the need for intervention from social or distributive policies. In this way, the “democratisation of credit” becomes a way of producing social inclusion. The levels of income inequality are reduced, as just noted about hidden poverty, by this virtualisation of income made by the regular and prolonged use of credit. The functioning of the credit market produces more inequalities since access to credit does not have the exact cost for all, or as Marx explains, the money of the poor does not have the same value as those of the rich (Thorup, 2017). In the particular Chilean case - although it happens at a global level with other financial services and other lenders - this is because although credit is accessible to all, not all forms of credit are. Those at the bottom of the income strata can only borrow in the most expensive forms (high-interest rates, associated insurance charges, and predatory repayment terms), which increases their vulnerability and means that they have less disposable income month by month and live with the risk of default, and thus being excluded, even temporarily, from the credit system, which in turn prevents them from continuing some of their material reproduction. Suppose a low-income family needs to renew their refrigerator, costing 400 Euro. In that case, their option is probably to buy it on credit, in a department store, where the purchase will be in 12

instalments and the final price will be 900 Euro. At the same time, those with higher incomes will be able to access a bank card payment (if necessary, since they could pay with savings or available money) without interest and take advantage of loyalty programmes to obtain benefits. Even those assessed with low scores in the “social test” of credit scoring - which not only considers income but is an actual socio-economic assessment that includes occupation, education, where studied, purchasing behaviour, financial behaviour - will have access to this high-cost credit.

In this consumption stage, many rigid social distinctions softened, and what was once transgressive is now accepted. An assumption underlying this logic, however, is the concept of freedom. Underlying this logic is the concept of individual freedom, which is concretised as freedom expressed in consumption. Eventually, the democratisation of credit developed in Chile during the 1990s and 2000s changed the perception of inequalities in two ways: a) the construction of upward social mobility narratives based on the regular use of credit and b) the changing meaning of class differences to the extent that some individuals assess the social stratification structure from the ownership of some goods or to the adoption of lifestyles primarily based on the virtual increasing of the purchasing power due to the expansion of credit.

Credit contributes to the diffusion of rhetoric by low-income financial consumer households that allows them to assess their social position through their ability to improve their living standards by using credit on a regular and massive basis. Credit practices cannot be explained as a purely macro-economic phenomenon or only due to the expansion or creation of a specific market, which is undoubtedly instituted in economic, political, social, and cultural processes. The media often portrays credit and indebtedness as isolated individual problems. Consumerism and over-indebtedness used to be represented as a monolithic duo and related to the hedonistic profligacy of credit card use (Moulian, 1998). However, frugality and prudence are values that function as a starting

point for how credit is managed, how it is integrated into purchasing and credit practices, and how families attempt to domesticate the financialisation of consumption and household financial planning. This domestication represents another round in the encounter between market and non-market arrangements. It feeds into assessments of their social position: the righteous use of credit, morally and materially, belongs to the “middle classes”, which are not supported by a subsidiary state, nor do they possess the wealth and income of the upper classes.

This group of (new) working-class financial consumers has normalised the financialisation of consumption in their daily lives, especially concerning the use of credit and debt. They have not fully assumed the commodified role of financial citizens. Still, they have become accustomed to living with the necessary evil of credit, mixing market rationalities with moral obligations and emotional claims. They express their unease about the discrimination and inequalities, at micro and meso levels, that make it difficult or frankly impossible for them to achieve their life projects, for example, the collusion practices of different companies, the scandals of big retail, and the failure in the provision of transport and public services. In effect, households have let themselves be carried away by discourses and praxis that make them solely responsible for their socio-economic present and future, assuming the demands of self-determination and autonomy of Chilean neo-liberalism. Much of this was synthesised in the idea of “abuse” in the context of the 2019 revolt that explosively combined elements of citizenship and consumption without considering them dichotomous.

This service proletariat is part of the “spurious tertiarisation”. The main features of these groups are low income, low power, low autonomy at work, and lack of alternative assets to produce income. The standard of living of these groups has seen some structural improvement, but as one of them explained, this is mainly due to “how easy it is now to access credit” compared to their parents’ generation. The result is a

persistent “middle-class rhetoric” in the way some members of the public interpret their class identity and social position. Moreover, this interpretation also induces them to think of themselves as part of a group that mobilises credit as an asset to achieve their goals - a dignified life beyond the production of identities based on educational attainment or occupational mobility.

Conclusion

Credit is a set of practices that intersect with other practices closer to home, such as shopping, paying, and budgeting. Credit is not a rationally economic individual behaviour but is rooted in shared meanings, standard views, and knowledge about what is appropriate to do in some cases. Similarly, credit practices cannot be explained as mere macroeconomic phenomena or only by the expansion or creation of a specific market, which is undoubtedly instituted in economic, political, social, and cultural processes. The figures show that credit practices are evolving, and people use cards in ways that lenders cannot even imagine or, at least, cannot track. People involve their knowledge when using cards and work out arrangements that are not necessarily linked to over-consumption.

From the micro, it is also possible to project observations to the macro. The expansion of credit has had a broader impact on socioeconomic relations in Chilean society. Credit helps to support the diffusion and negotiation of post-industrial proletariat and precariat families with the rhetoric of middle class or disguised poverty as financial inclusion and household equipment. Through a process of pragmatic adaptation to the expansion of credit, the highly normalised and morally justified mass and regular use of credit in households have led to the development of a distinct sense of social mobility. In particular, this post-industrial Chilean working class exhibits a sense of “middle-class consciousness”. The rhetoric of the middle class as a social formation is produced in economic, social, and political discourses (public policies, advertising, political campaigns, business) and is operationalised by the

social actors through the use of credit as something distinctive of the middle class, which has no access to wealth, but also no access to state aid; it is an excellent sign of agency and non-dependence to use credit.

The expansion of credit in Chile has entailed a set of emotional, moral and emotional, moral and rational practices on the part of Chilean households. It also changed how they assess and interpret social stratification and inequalities. Besides their construction of narratives of social mobility and their positioning as “middle-class” despite their precarity, they perceived a less unequal society due to a change in their perception of inequalities. More access to consumption implies that everyone seems to be in a similar social position, and the distance between the lower and upper classes is disguised.

If in developed countries, credit has been an instrument to help the middle-classes maintain their status and living standards, either in the face of the withdrawal of the welfare state or stagnating wages. In Chile, where the economic retail groups have largely led access to credit, the story is different. The lack of a large established middle-class, lower savings, and the absence of a consumer culture before the expansion of credit must be taken into account, as well as the lack of a strong welfare state. Nevertheless, until the mid-1970s, the majority of the population depended on public provision of health, education, housing, pensions, essential services, and so forth. Chilean neoliberalism, as a set of governmental principles that, among other reforms, deregulated and encouraged the creation of markets such as credit, allowed for an expansion of indebtedness as a means of financing consumption aimed at middle and lower-income groups. In this context, the more or less critical evaluations of Moulian (1997), Larraín (2001), Tironi (1999), Garretón (2001) fundamentally around the effects of the expansion of consumption for social cohesion, political participation, and the search for status, where the ideals of social justice (Arun, 2022b) are not discussed but rather operationalised from an instrumental

perspective of social inclusion-exclusion (Cubillos-Almen-
dra, 2017). But what about the empirical analysis of how such
consumption is accessed and practised in less visible contexts,
such as those of the vast majority of low-income households?
What happened twenty years later? Indeed, the massive use
of credit has more to do with the development of popular
pragmatics of knowledge, values, and strategies by families to
develop their economic life than with the continuous search
for the novelty of consumption or aspirations of distinction,
especially in low-income households. In this context of rela-
tive poverty, equipped or “poor”, “vulnerable”, “precarious”
middle classes, there is certainly room, as Stillerman (2000)
has already suggested, for modest aspirations around the idea
of the “dignified life”, which has various meanings. This idea
may be linked to occupational elements, such as the yearning
to be “my own boss”, but it is undoubtedly linked to material
life.

Once again, if people are struggling to make ends meet and
to achieve their family projects, it is because Chilean neo-
liberalism has set the conditions for this way of producing
material conditions for families: every credit for each need.
State and market foster debt as a way to progress in life. Con-
sequently, the unfitting perception of inequality regarding
the unequal distribution of income and the growing sense of
exclusion cannot be explained by rampant consumerism or
lack of financial education: unfair structural conditions are
crucial both for the material conditions of inequality and the
cultural and moral system of representations which help to
disguise them.

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A Clash of Habitus: Britain and the COVID-19 Pandemic

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Introduction

On 23 March 2020, in response to COVID-19, the British government announced that the country would enter lockdown. At the plea from Prime Minister Boris Johnson, the population was advised to stay at home, follow strict social distancing rules of two metres, and adopt additional preventative measures to keep safe. Overnight, drastic changes occurred in the lifestyles and well-being of the population. When lockdown came into effect, people were no longer allowed to leave their homes except to shop for essentials (e.g., food and toilet paper); no longer allowed to enter recreational places (e.g., parks and leisure centres); and no longer able to interact with others in person from another household (e.g., extended family and friends). Furthermore, people were told to work from home, stop attending school, and avoid unnecessary contact. In various ways, these rules were followed and flouted by the population. On the one hand, people followed these rules because they recognised these were necessary measures to ensure the containment of COVID-19; on the other hand, people flouted these rules because they saw them

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as breaching their fundamental human rights. Despite this, the British government's response to COVID-19 has created a 'clash of habitus' in a temporary way, with people agreeing and disagreeing with the lockdown procedures. In doing so, the sudden lockdown procedures have generated a series of conflicts, confusions, and deficiencies in the habitus of the population.

Emerging sociological studies have attempted to map the impact of COVID-19 across socio-cultural and geographical dimensions in areas such as education (Bao, 2020; Peters et al., 2020), ethnic disparities (Laurencin and McClinton, 2020), gender (Blundell et al., 2020; Collins et al., 2020), racism and hate crime (Gover et al., 2020), and work and employment (Akkermans et al., 2020; Spurk and Straub, 2020). While these scholars contributed toward the study of COVID-19, there is attention being paid to a Bourdieusian understanding of the meaning of social change (Esposito and Principi, 2020) to map out the effects on everyday life because of the lockdown measures (Keddell and Beddoe, 2020; Williamson et al., 2020), behavioural changes in cultural consumption and social capital (Codagnone et al., 2020), and in the social, emotional, and cognitive impact of the absence of social relationships and rituals (Nikolau, 2020; Restubog et al., 2020).

Recently, there has been a call for an Eliasian reading of COVID-19 to identify how Elias's theory of civilising processes – the relationship between state formation and changing social attitudes towards sex, nudity, violence and, among others, hygiene and relationships – could shed light on how social distancing across epidemics in history as a critical dynamic mechanism of the civilising process and a key to understanding its future transformations in society and public health practices (Bianco, 2020), and on how the individual internalises socially sanctioned prohibitions, restraints expressive impulses, and is impacted by sociogenetic shame associated with the breaking of such prohibitions, which gradually become in time a constitutive element of the self and its normative behaviour (Blomert, 2020).

Despite Bourdieu's and Elias's highly compatible approaches in terms of social reproduction (see Paulle et al., 2012), current research has not considered their sociological perspectives together to attempt a relational analysis of the impact of COVID-19 on different populations. Within this chapter, we borrow from both theorists by integrating the concepts of 'civilising offensives' and 'habitus' to develop an understanding of the transformation in habits of the British population in response to governmental anti-pandemic policies. As the deliberate and conscious attempt of a state to alter the behaviour of the population to inculcate 'civilised' and 'lasting' habits, which gradually become 'self-restraints' and 'second nature' habits, we argue that the concept of 'civilising offensives' helps us to understand contemporary changes in everyday conduct and behaviour of the British population as a result of direct governmental intervention. Furthermore, we argue that Bourdieu's concept of 'habitus' directs us to a more rounded understanding of how the internalisation of external structures prompts individuals to react to societal solicitations, which include those related to COVID-19 policy arrangements, systematically and coherently (Bourdieu and Wacquant, 1992: 8). Although we do not expose these scholars' theories extensively, we direct our attention to the analytical convergence between 'civilising offensives' and 'habitus' to show how they are valuable tools in capturing changes in conduct.

Therefore, this chapter takes a fresh approach to the social impact of COVID-19 in Britain. While not disregarding emerging sociological literature on the COVID-19 pandemic, it approaches the topic by coordinating Elias's concept of 'civilising offensives' and Bourdieu's concept of 'habitus'. By doing so, it considers the dialect of governmental policy measures to the pandemic in Britain from one side and its impact on the habitus of the British population with a view to primarily contribute to the development of a better understanding of how dispositions can also be tied to top-down imposed changes from the other side. This approach recognises that

sociological inquiry can stimulate new advances in the analysis of COVID-19's social impact on populations and constitute fertile ground for mapping longitudinal habitus changes within policy context in and beyond the case of Britain. As such, this chapter is structured as follows. First, we discuss existing contributions regarding civilising offensives, bridging this to Bourdieu's concept of habitus and its hysteresis to problematise the adjustments experienced by the British population during the COVID-19 outbreak. Second, we present the design of our secondary quantitative data analysis, involving the Opinions and Lifestyle Surveys commissioned in 2020 by the UK Office for National Statistics to map the social impact of COVID-19 in Britain. By connecting the deep affinities between Elias and Bourdieu, this study contributes to sociological knowledge of the socio-economic impact of COVID-19 on the British population by showing that embodied dispositions can be triggered, adjusted, and reconstituted by unfolding policy and governmental solicitations as a civilising offence. More broadly, we also contribute to mapping the temporal manifestations of habitus as embedded in COVID-19-related social engagements but also oriented toward the present as a capacity to adapt within current (pandemic) contingencies.

The Concept of Civilising Offensives

The concept of civilising offensives was coined by Dutch historian Piet de Rooy.³ Developed in the Netherlands in the 1980s, civilising offensives became an extension in the works of Norbert Elias. To describe civilising offensives, Powell (2013: n.p.) states:

[T]he term has been disseminated widely [...] and penetrated political and popular discourse as a means of describing the

³ Piet de Rooy used the concept to analyse how the Dutch bourgeois class attempted to change the lower classes in the nineteenth century (see de Rooy, 1979). However, from the 1980s onwards, the influence of Norbert Elias changed the direction of the concept in which aspects of the civilising processes were incorporated into the concept itself.

deliberate, conscious attempts of powerful groups, including a historically paternalistic state, at altering the behaviour of sections of the population and inculcating lasting, 'civilised' habits.

Unlike civilising processes, which are unplanned and unintended, civilising offensives are planned and intended processes that change the behaviour and emotion of an individual in a discernible direction (van Krieken, 1999; Powell, 2013; Mennell, 2015). Furthermore, the effects are relatively short-term and directly affect specific segments of society.

A few studies have been conducted using the concept in Dutch society. These studies have been focused on a variety of aspects. As Verrips (1987: 3) explains:

The term 'civilising offensive' is used by Dutch sociologists and historians to refer to a wide range of phenomena, from nineteenth-century bourgeois efforts to elevate the lower classes out of their poverty and ignorance and convince them of the importance of domesticity and a life of virtue, to the oppression of popular culture in early modern times and, in general, "the attack on behaviour presumed to be immoral or uncivilised."

To significant effect, Dutch scholars such as de Regt (1984) studied the working class and their families, Otterloo (1985) studied the effects on eating habits, and Mitzman (1987) studied the impact of religion. There are other studies conducted by several Dutch scholars (see Verrips, 1987; van Ginkel, 1995), but these studies have illuminated the broad effects of powerful groups on specific groups in the population that characterised a 'civilising offensive' in society. In addition, these studies became essential reference points for cases found in British and other societies (see, for example, van Krieken, 1999; Powell, 2007; Clement, 2010; Pinker, 2011; Rodger, 2012).

Based on these studies, the concept has been used in various scenarios to illustrate the emergence of civilising offensives in society. While these studies found similar findings, their intention has been greatly diversified. This is noted by Flint et al. (2015: n.p.):

While some studies cite the benevolent intentions of civilising offensives [...] other scholars point to their pernicious or barbaric effects on popular and minority culture [...] or their relative ambivalence [...] often related to shifting balances of power within the civilising process.

This difference in intention highlights a significant point. Even though the concept can be used to understand how the actions of powerful groups influence other groups, the concept can be used in various ways to illuminate the lasting impact these groups had on the behaviour and emotions of individuals in society (Powell, 2013; de Regt, 2015). Whether for ‘benevolent’, ‘barbaric’ or ‘other’ means, civilising offensives can serve as a helpful tool to explain how broad approaches adopted by powerful groups have a perverse effect on the habitus found in particular groups in society.

The Effect of Civilising Offensives on the Habitus

When examining the effects of civilising offensives, we need to understand how ‘habitus’ is formed. As a primary meaning of the term, according to Crossley (2012: 139), ‘Habitus [...] suggests ‘acquired ability’ rather than ‘repetitive faculties’ [...] it suggests ‘practical reason’. To acquire habitus is to acquire means of knowing, handling and dealing with the world.’ This definition implies that habitus plays an important part in everyday life, influencing our behaviours and emotions in multiple dimensions. There are, however, different perspectives on understanding how habitus is formed (see, for example, Crossley, 2013). Though we do not reiterate its composite dimensions or its criticisms here in this chapter, we will approach the understanding of habitus from two theoretical perspectives: the Bourdieusian and Eliasian.

From a Bourdieusian perspective, habitus is among the most influential but ambiguous concepts. Within the works of Bourdieu, he refers to habitus as ‘structured structures predisposed to function as structuring structures’ (1990: 53). What this implies is that habitus is a system of internalised

dispositions, skills, and habits, proceeding from our background, education, and socialisation experiences, which acts as an objective basis for regular modes of behaviour and informs everyday life. In this sense, habitus is understood as a 'structured body, a body which has incorporated the immanent structures of a world or of a particular sector of that world – a field – and which structures the perception of that world as well as action in that world' (Bourdieu, 1998: 81). Although this emphasis might indicate a constrained repertoire of possible actions granted by the habitus to individuals, who are steered by regular ways of thinking and behaving, Bourdieu does suggest of possibilities for habitus to change through different types of socialisation. For instance, Reay's influential discussion of habitus transformation argues that 'while habitus reflects the social position in which it was constructed, it also carries within it the genesis of new creative responses that are capable of transcending the social condition in which it was produced' (2004: 434-435). Therefore, habitus allows both to set a course of action in the individual and a group by integrating the past into the present. Still, it also enables change within its own system of dispositions so that if objective field conditions change, new possibilities emerge for the habitus, too.

However, from an Eliasian perspective, habitus is an important concept but is seen as a continuous process. Within the works of Elias, habitus is referred to as 'second nature'. As Mennell and Goudsblom (1998: 15) explain, '[i]t refers to those levels of our personality makeup which are not inherent or innate but are very deeply habituated in us by learning through social experiences from birth onwards.' This means that our personality make-up is so deeply habituated that it feels almost 'natural' or 'inherent' in ourselves. Not only does our individual habitus guide our behaviours, but it also continuously moulds itself in social settings or situations marked by specific changing power differentials over time. While there is a resonance with Bourdieu's conceptualisation that habitus could change through different types of socialisation,

the Eliasian perspective sees habitus as ‘continuously produced through ongoing and multiple interdependences at different layers of social integration’ (Connolly, 2016: 254). For example, Elias (1991: 21) argues: ‘At birth individual people may be very different through their natural constitutions. But it is only in a society that the small child with its malleable and relatively undifferentiated mental functions is turned into a more complex being.’ As such, it is within the interaction with others that an individual can develop their habitus and acquire the necessary character as individuals in complex relationships they are enmeshed in found in society.

Found in Bourdieusian and Eliasian interpretations of habitus, the effects of civilising offensives are apparent. When an individual experiences changes in social situations, which could be caused by internal (personal) and external (societal) forces, habitus formation is affected in that the individual will attempt to construct a new set of habitus to guide their behaviours and emotions in a specific direction. As this chapter will demonstrate, the British government’s response to COVID-19 can be regarded as a ‘civilising offensive’ because evidence suggests the British government’s planned and intentional attempts to promote the ‘new normal’ has significantly affected the behaviours and emotions in the British population. More importantly, this planned attempt has created a ‘clash of habitus’ in British society because of the sudden imposition of strict rules and regulations forcing the population to adopt and adapt to a different lifestyle, generating conflicts and confusions in habitus formation.

The British Civilising Offensive Against COVID-19

When the country entered lockdown, the British government introduced various measures on the entire population. From childhood to adulthood, movements were severely restricted by a series of policies found in the *Coronavirus Act 2020*. There are four main aims outlined in this legislation:

1. To enhance the flexibility of staff deployment for public services.

2. To ease the administrative burden on public bodies.
3. To invest further powers in the government to slow down the virus.
4. To manage the deceased.

Following the provisions enshrined under these four aims, the government actively regulated the population to contain the pandemic. Throughout the process, the government has planned and deliberately attempted to guide the behaviours and emotions of the population in a specific direction by causing temporary changes in the public and private spheres of the country. As such, let us now examine the government's effects on these two spheres in turn.

In the public sphere, the government actively regulated how the population should interact outside their homes. By introducing strict rules, necessary controls were implemented to ensure the spread of the virus was contained. As part of the national campaign to 'Stay at Home, Protect the NHS and Save Lives' started on 25 March 2020, the government introduced measures encouraging the population to stay at home, social distance two metres, avoid contact with others except those in your own household, closure of businesses and venues, ceasing of social activities and events, and dispersal of mass gatherings (BBC, 2020b; Sparrow et al., 2020; Johnson, 2020; Walker, 2020). Under these strict rules enforced by the government, the population was encouraged to comply in order to slow down the spread of the virus. Furthermore, failure to comply resulted in sanctions from the police, such as warnings, fines, or prison sentences. This had an adverse effect on the public sphere because the population was forced to adapt for the sake of national interest.

In the private sphere, the government played an equally active role in regulating the private lives of the population. Through the reinforcement of existing rules, controls were implemented in how people should act in their everyday lives. As part of the national campaign to 'Stay at Home, Protect the NHS and Save Lives' started on 25 March 2020, the

government encouraged the population to self-isolate when showing COVID-19 symptoms, wash their hands for more than 20 seconds, shop only for basic necessities, work from home, limited numbers of people participating in funerals, entitled to one exercise per day alone or with household members, and the closure of schools (BBC, 2020a; Lawrie, 2020; Public Health England, 2020; Sherwood, 2020). These strict rules imposed on the population deeply affected their private lives because individuals could no longer pursue private activities as normal. Furthermore, failure to comply with these resulted in sanctions from the police. As with the above sphere, this affected the private sphere because individuals must comply to keep their families safe amid the pandemic.

Within the changes found in these two spheres, there has been an adverse effect on the population, and a civilising offensive is present that attempts to deliberately push the behaviours and emotions of the population towards a specific direction, creating the alleged 'new normal'. Although these above restrictions were evident for most individuals, many are confused and unclear about the rules and restrictions imposed on them. Although some of these rules and regulations were eased under the campaign to 'Stay Alert, Control the Virus, and Save Lives' started on 11 May 2020 that saw the government announcing lockdown easing policies, the government still maintained an active role in changing the behaviours and emotions of the population to contain the virus further and attempt to instil a sense of 'new normal' by forcefully and temporarily changing the habitus of the individual. Doing so has inevitably resulted in a 'clash of habitus' in that old and new habitus found in an individual attempt to co-exist with each other, which generated tensions and conflicts in a temporary way. To contextualise this 'clash of habitus' found in society caused by the government's response to COVID-19, we will turn to a set of data from the Office for National Statistics (ONS) to chart temporary habitual change found in the population in Britain.

Methodology

Following the mapping strategy of temporary habitus change in the British population's experiences during the COVID-19 pandemic requires rich data, with social and economic indicators of a wide range of lifestyle variables. Because of limited opportunities for conducting primary research in the short term capable of offering such analytical opportunity, in seeking to answer the questions, "how does policy enacted by the British Government in response to COVID-19 affect the habitus of the British population?" and "has the governmental response to the pandemic created a 'clash' between 'old' and 'new' habitus in a temporary fashion in the British population?", this study adopts secondary quantitative analysis. We identified secondary quantitative analysis as a viable and systematic method for practicality, temporality, and reliability reasons to map the social impact of the pandemic across the broader British population.

As the most comprehensive accessible dataset, we opted for the UK Office for National Statistics 2020 Indicators from the Opinions and Lifestyle Survey (OPN) "Coronavirus and the social impacts on Great Britain", a cross-sectional monthly omnibus survey administered to those aged 16+ and conducted eight months per year. The ONS has adopted it as a weekly survey to collect data related to the impact of COVID-19 on the everyday life of people, households, and communities in Britain. The OPNs cover 9 April to 4 September 2020 through 15 national-scale surveys launched by ONS to cover from 20 March 2020 (as the government announced lockdown measures) until the gradual relaxation of lockdown measures.

To explore the relationship between COVID-19 governmental policy measures and the British population change in habitus throughout the pandemic, as well as how such measures affected the habitus of the British population creating a 'clash' between 'old' and 'new' habitus in a temporary fashion, the research design follows a secondary analysis of OPN surveys data through a temporal trajectory. We chose to focus on four periods, covering: the British government's imposition

of lockdown measures on 23 March 2020; the extension of lockdown restrictions imposed on 16 April 2020; the publication on 11 May 2020 of a government policy announcing “Our Plan to rebuild: the British Government’s COVID-19 recovery strategy”; and the relaxation of lockdown measures throughout July and August 2020. Conversely, we located these periods throughout 4 out of 15 OPNs: (1) the 16 April 2020 OPN survey, covering the period 27 March to 6 April 2020; the 14 May 2020 OPN survey, covering the period 17 to 27 April 2020; the 29 May OPN survey, covering the period 21 to 24 May 2020; and the 14 August 2020 OPN survey, covering the 5 to 9 August period, which also compares headline indicators collected in June, July, and August with previous reports. We argue that these periods represent the pandemic’s social, economic, and psychological consequences on individuals’ behaviours throughout a consistent timeline.

To operationalise modalities of habitus change, we then extracted one composite indicator included in the OPN surveys, collecting information on the pandemic’s ‘Impact on people’s life overall’. Specifically, this indicator relates to multiple everyday life effects (including work, education, finances, shopping, etc.) experienced by individuals and households in Britain, which we deemed sufficiently comprehensive and succinct to map habitus change over a limited period. By using disaggregated data initially in the surveys, we maintained sex and age 16-69 as theoretically relevant control variables. However, for space reasons, we do not map here pandemic-related behaviours and attitudes that can be expected to be associated with the adult male and female cohorts of the British population. This indicator was available for all the periods covered in this article. In August 2020, we integrated the indicator with a newly available part of the survey, ‘Trends on headline indicators’. We included this indicator as an entry point for longitudinal observations about COVID-19 habitus change in Britain from March 2020 onwards. In contrast with the previous one, this indicator presents aggregated data for all persons in total.

The original datasets present some limitations; the monthly sample sizes collected across the period are consistent, but relatively small (around 2000 individuals per survey), and topical modules were not probed because of the length of the questionnaire. The chapter also addresses a limited choice of discrete variables due to word count constraints. OPNs are subject to sampling variability and non-sampling errors, including non-response, response errors, and errors when inputting and processing data. Such effects were minimised by ONS through testing and quality control procedures throughout. Weighting was also applied to estimate the representativeness of the population, including population distribution across sex, age, employment status, region, highest qualification, National Statistics Socio-Economic Classification (NS-SEC) and underlying health conditions. A subsequent test through computer-assisted survey processing system Blaise helped the ONS to test variables, including the degree of confidence in the outputs, standard errors, confidence interval, coefficient of variation, and statistical significance. The OPN surveys considered in this study use a 95 per cent confidence level, expecting that, on average, 19/20 (95 per cent) of resulting confidence intervals contain actual population values.

However, these limitations do not invalidate the final empirical outcomes. On the contrary, the methodological choice of this chapter presents strengths, as the rigorously monthly tested variables of the surveys across the period and the weighting strategies adopted by ONS limit the impact of bias and provide answers to issues of immediate COVID-19 policy interest. The original datasets and the present study guarantee anonymised data through the UK Data Service (UKDS). As registered users, the researchers accessed the datasets free of charge and abided by the consent and anonymity conditions of the original study. The processes of categorising and summarising the data for the secondary analysis rely upon inferential statistics. A summary of the data, including emerging patterns, is reported in the section below for clarity.

Findings

The headline indicators for the periods 20-30 March, 17-27 April, 21-24 May, and 5-9 August map the general impact of the pandemic measures on the British population. To reduce the spread of the infection, the British government introduced on 23 March 2020 (with immediate effect) three 'stay at home' measures, requiring the population to stay at home, except for very limited purposes (including 'Keyworker travelling to work', 'Shopping for basic necessities', 'Any medical need' or 'Exercise once a day'); closing all non-essential businesses and venues, such as pubs, restaurants, and shops; as well as stopping all public gatherings of more than two people. These measures were suspended on 10 May 2020, and throughout their enforcement, the police were given the power to give fines and disperse gatherings. Data shows that an increasing percentage of people (80 per cent), as a result of the measures, isolated for a continuous period starting from April, with fewer people continuing to stay at home (23 per cent) after the relaxation of the measures in August. Similarly, people working from home rose to 39 per cent and dropped to 6 per cent in the same time span. The consequences of the measures and their relaxation had a more continuous impact on perceptions of well-being and lifestyle, as a consistent percentage of adults reported that these are still impacting their everyday life (80-67 per cent), as well as causing low levels of wellbeing (48-40 per cent), high anxiety and loneliness (50-33 per cent; 24-24 per cent).

Headline indicators suggest that the 'civilising offensive' of the British population to help navigate the COVID-19 pandemic is a chain of change and interdependence closely tied to people's dispositions. We draw upon this preliminary data to argue that the measures advocated by governmental and policy response to the pandemic – including social distancing, isolation, the inability to travel, attend events or visit mundane places such as cafes – have caused processes of transformation of people's habitus in Britain, as people require a particular change in their practices and relations with

everyday life and with others. In this sense, the civilising offensive depends on the organising response to the COVID-19 pandemic, which affects existing social dynamics towards a national-scale capacity for habitus change. In the following subsections, we explore these dynamics concerning the impact on people's lives and measures such as social distancing and face masks.

Civilising Habits: COVID-19 Measures and Impact on the Population

Looking at the second OPN indicator considered in this study, 'Impact on people's life overall', we argue that the COVID-19-driven policy changes should be considered in the context of the civilising process (Goudsblom, 2003: 154) as leading to changes in habitus (though potentially temporary), hence as part of the 'internalisation of the social order in the human body' (Bourdieu, 1984: 170) in terms of new public health attitudes.

Data collected show that a substantial percentage of the British population in March 2020 was very worried (34.2 per cent) or somewhat worried (50 per cent) by the pandemic onset and related containing measures. This trend remained constant throughout April (respectively 23.4 per cent and 56.7 per cent), May (16.8 per cent and 56.1 per cent) and August (16 per cent and 56 per cent). We understand both the slight decrease in 'very worried' and the consistent rate of 'somewhat worried' individuals as informants gradually internalise the changing social behaviour and norms driven by the pandemic measures. Arguably, the population has been adjusting to the new 'normal' as part of a process of habitus change operating in unison with altered field conditions (Bourdieu, 1977).

Work and household finances were the most impacted by COVID-19 and related policy restrictions, which have led to more and more employees working from home in an attempt to stop the contagion. Home working patterns in Britain brought significant disruption to workers, ranging from 56.7 per cent in March and 59.1 per cent in April to 42.9 per cent in

May and 33 per cent in August. Although the latest figure suggests that with the relaxation of prevention measures, many workers returned to in-office activities, the massive increase in the incidence of working from home significantly impacts individuals' arrangements in the organisation of work life. Notwithstanding, these changes might be temporary and can be reversed with the restart of everyday and economic activities, current data points to changes in habitus formation and evolution concerning labour. For instance, many employees in Britain found the move to a predominantly home working culture needing more flexible arrangements regarding hours and tasks than in-office culture. This change might be internalised in the future as part of a significant segment of British workers' habitus as a result of the civilising offensive, as the increase in working from home accelerated 'a pre-existing but slowly evolving tendency towards smart working and flexible work arrangements' (Hupkau and Petrongolo, 2020: 5).

The civilising offensive also affected disciplining individuals' grocery and supermarket shopping nationwide. Particularly during the early stages of the lockdown, collective fear about food shortages (e.g., the much commented 'panic buying' of toilet rolls) and limited freedom in leaving the household if not for essential activities impacted public behaviour habits of consumption. 59 per cent of individuals at the beginning of lockdown in March lamented changed experiences in the availability of groceries, medication, and essentials, as well as their capacity to access them (40 per cent), a trend which reverted in August (21 per cent and 25 per cent respectively). Looking further at other available data, consumer behaviour did change regarding shopping habits. For instance, available patterns among consumers in March 2020 show that 40 per cent of 18-35-year-olds, 31 per cent of 35-55-year-olds and 32 per cent of 55-75-year-olds were buying additional items compared with their usual shopping (Sabanoglu, 2020). Stockpiling of consumer goods and changed shopping behaviour surged amid the lockdown measures and the broader post-quarantine restrictions implemented by the British

government as an additional aspect of habitus change driven by the civilising offensive.

In turn, these policy restrictions affected individuals' freedom and independence. For instance, 30.9 per cent of the British population declared that their relationships were being affected at the beginning of such impositions, a figure which remained at 20 per cent in August 2020, whilst in the same period, 49 per cent of informants shared that they felt restricted in terms of freedom in everyday life. Unprepared for unexpected and long-lasting confinement, individuals' habitus were deprived of previously internalised and normalised ways of living and negotiating social relations. Arguably, spatial confinement, the increase in digital communication through channels such as Zoom, and limited physical closeness - all consequences of top-down COVID-19 restrictions - engendered a social shift in how relationships were experienced and made available to the population. As 'biological beings and social agents who are constituted as such in and through their relation to a social space' (Bourdieu, 1996: 11), individuals in Britain struggled to maintain and adapt to a new set of living relationships, integrating 'the progressive inscription into bodies of the structures' of the new social order' (Bourdieu, 1996: 17).

Therefore, we can see that the British population's habitus was permeable and responsive to the transformed field conditions in compliance with governmental measures for containing the spread of the virus and modified as individual experiences came into contact with the top-down imposed civilising offensive brought about by health emergencies. The previous experiences to which the dispositional architecture of British people's habitus was subject (Bourdieu, 2000: 161) were fundamentally limited by the new policy dispositions that inserted themselves into the scaffolding of everyday life and 'normalcy' (Wacquant, 2013).

A Sanitising Offensive: New Public Health Practices

In this subsection, we build upon our analysis to further understand how the COVID-19 governmental response represents a civilising offensive, which has conversely changed the habitus formation of the British population concerning health practices.

When asked in March 2020, ‘In the past seven days, have you washed your hands with soap and water to avoid infection?’ 99.7 per cent of the total sample responded affirmatively. Similar high percentages to positive answers could be found in relation to other surveyed aspects, such as ‘Have you washed your hands with soap and water or sanitiser straight away when arriving at work to avoid infection?’ (71.4 per cent), ‘Have you washed your hands with soap and water or sanitiser straight away when arriving at home?’ (88.9 per cent) and ‘Have you washed your hands with soap and water or sanitiser before eating?’ (89.7 per cent). The high level of compliance with the most basic public health measures – hand washing to prevent the virus from spreading and the associated use of alcohol-based sanitiser – exemplified by the data suggests a shift in behaviour. Individuals manage these acts as external constraints in conjunction with the current policy and structural transformations of the British civilising offensive of its population and as self-restraints, where informants take care of personal hygiene to prevent infection at the individual and group levels.

Most interestingly, the data provide details on the habitus transformation experienced by the British population before, during, and after the pandemic to hand washing practices. In asking in March, ‘Have you been washing your hands with soap and water more, less or the same since the Coronavirus (COVID-19) outbreak?’, 91.6 per cent of the surveyed answered ‘more’, followed by 89.5 per cent respondents who equally answered ‘more’ to ‘Have you used a sanitiser more, less or the same since the Coronavirus (COVID-19) outbreak?’. Additionally, respondents’ survey answers confirm a change in weekly hygiene practices, suggesting that 72.3 per

cent of the population cleaned their hands with sanitiser to avoid infection the previous week. In April, individuals kept regularly washing their hands (99.5 per cent) and using sanitiser (69.1 per cent), with the latter becoming internalised as a routinised behaviour performed straight away when arriving at home (88.3 per cent). Furthermore, 24.2 per cent and 74.9 per cent of respondents respectively declared that they have been washing hands more or the same since the pandemic outbreak, as well as declaring additional (21.4 per cent) or same (72.2 per cent) use of sanitiser in the same timeline.

The civilising offensive thus brought about a rather abrupt change of habitus for the vast majority of the population, similar to what Bourdieu (1999) calls the ‘habitus clivé’, that is, a sudden dislocation of one’s habitus from the new habitus required in a new field, or in engaging in new practices. Here, we can see that for the respondents, turbulent change in everyday hygiene practices driven by anti-pandemic measures conceptualise a hysteresis effect, ‘a temporal lag where some persisting elements within the habitus clash with the social context of their production, exposing individuals to dispositions, actions, and bodily behaviours which no longer reflect previous internalisations’ (Bourdieu, 1990). Furthermore, when the habitus is subject to hysteresis, misaligned practices are ‘liable to incur negative sanctions when the environment with which they are objectively confronted is too distant from that in which they are objectively fitted’ (Bourdieu, 1977: 78). Resisting habitus transformation and giving in to hysteresis – in the sense of not following proper handwashing or sanitising practices – increases exponentially the medical risk of becoming infected with COVID-19. Here, Bourdieu’s thought assists us in arguing that, given the ‘negative sanctions’ under the form of contagion and the threat of death, a clash of habitus – in the case of COVID-19 Britain at least – remains less intense than perhaps we would have presumed.

Another newly adopted health practice relates to using face coverings (or ‘masks’) as a source of control to reduce the spread of the virus in the population by minimising

respiratory droplets excretion from infected or asymptomatic individuals. To the question, 'In the past seven days, have you used a face covering when outside your home to slow the spread of the coronavirus (COVID-19)?' 29.3 per cent of the sampled population responded positively, whilst 70.7 per cent responded negatively in the period covering the 21-24 May 2020 and the previous week.

Surveyed again in August, the answers were 96 per cent 'yes' and 3 per cent 'no'. Additionally, across May and August, respectively, 26 per cent – 78 per cent and 15 per cent – 13 per cent of informants declared that it was very likely or fairly likely for them to wear a face covering when outside the home to help slow the spread of the coronavirus, whilst those who responded 'very unlikely' decreased from 21.7 per cent to 2 per cent. The internalisation of this new behaviour is observable across many different daily practices throughout May and August 2020, from travelling on public transport (4.6 per cent and 20 per cent), at work (20 per cent and 25 per cent), when meeting someone outside the household (14.2 per cent and 16 per cent), and while running errands (19.6 per cent and 32 per cent), so that in August 2020, a total of 95 per cent of individuals have worn a mask while shopping, and 92 per cent while travelling on public transport. Our analysis here suggests that the use of masks has gradually become more ingrained in the habitus of the British population not only as an anti-contagion practice but also as a 'civilised' behaviour which 'is both intrapersonal and interpersonal in that it manifests both within individuals as self-restraint and between individuals as conformity to expected social propriety' (Thurnell-Read, 2016: 93-94).

Already Elias (2012) indicated social distancing as one of the characteristics of the civilising process, and our analysis also shows that this practice has been arranged as part of the civilising offensive to limit the COVID-19 contagion. Considering the issue 'In the past seven days, have you avoided physical contact with other people (such as shaking hands) to avoid infection?', respondents replied 'yes' from 96.8 per cent

in March to 94 per cent and 97.9 per cent in April and May respectively, with this figure decreasing to 85 per cent in August. The variation can be explained by the imposition, as part of the civilising offensive, of avoiding in-person contact and all contacts under a two-metre distance in March and April as a consequence of the lockdown measures imposed by the government. As of August 2020, the government has set out new national guidance on its plan to return to normal life in a way that eases previous restrictions to mobility, work, businesses, relationships, and shopping, whilst maintaining measures that continue to protect communities.

Therefore, appeals to social distancing for health preservation are still advanced – under a different form – by governmental policies as justifications for developing civilising practices of the British population. Connecting informants' micro-social experiences of avoiding social contact throughout March-August to the larger civilising offensive of the introduction and gradual transformation of new health practices as the pandemic situation progresses, Elias (2012) can be critically appropriated here to understand how restrictions to social relationships disciplined the population and their habitus. Here, data suggest that self-regulation and restraint in in-person contacts in different settings and practices – from private to working life – inform respondents' habitus of what constitutes, in current pandemic times, socially acceptable and conversely unacceptable conduct.

Conclusion

This chapter has demonstrated that the response to the Coronavirus pandemic has caused a 'clash of habitus' in the British population. As a civilising offensive, the measures enacted by the British government have changed the public and private spheres of individuals in the country. From the start of the lockdown to the end of the lockdown, measures introduced by the government have affected the habitus of the British population creating a 'clash of habitus' in that 'old' and

‘new’ habituses are continuously forming, which has generated tensions and conflicts in the individual.

Both Elias and Bourdieu have presented a plausible explanation to this sudden change in habitus during the pandemic in Britain. When an individual experiences changes in social situations, which were caused by internal and external forces, habitus formation is affected in that the individual will attempt to construct a new set of habitus to guide their behaviours and emotions in a specific direction. As a result, during the pandemic, the shift in internal and external dynamics caused by the change in personal dynamics (e.g., family interactions) and societal dynamics (e.g., government policies), in the form of a civilising offensives, generated a swift habitual shift that was forcibly exerted on the individual, which compelled him or her to exert greater self-restraint against external constraints.

Moreover, as the data from the ONS has shown, respondents to various questions have expressed the abrupt changes introduced by the government that have directly affected their habitus. Therefore, we argue that since the objective conditions of British society have changed during the COVID-19 pandemic, habitus has also changed due to the new social disposition imposed on individuals. However, we also acknowledge that, even though the data has shown us valid data, different parts of the country have re-entered into lockdown. Consequently, this ‘clash of habitus’ is an ongoing process that requires further investigation. For now, however, this chapter has shown a ‘clash of habitus’ in the British population created by the British government’s response to COVID-19 and demonstrates how an Eliasian and Bourdieusian approach can help explain this phenomenon.

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Just Society by Allocating Money? -Contending Models of Universal Basic Income and Their Limits-

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Introduction

Universal Basic Income (UBI) has entered the political mainstream by receiving the support of various actors and groups across the political spectrum over the last decade (Arthur, 2016; Drury, 2022). UBI can be defined as a social policy through which a government provides regular and guaranteed income to all citizens (or residents) without any pre-condition to be satisfied. It can alternatively be defined as “free money for all” (Walker, 2016).

Debates concerning the UBI have lately gained momentum both among the public and within various policy circles through diverse interpretations, discourses, and articulations. Rightist, conservative, social democrat, socialist and anarchist thinkers, as well as technology entrepreneurs, trade unions, and human rights organizations, have supported and justified distinctive UBI models from their own perspectives (Straubhaar, 2017). Taking ongoing discussions regarding the UBI into account, this study presents an evaluative classification of various models of UBI, which is currently not a consensual policy proposal but a contested political project. In

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doing so, it draws attention to different modalities and interpretations of UBI, which are indeed based on political projects (or *utopias*) and ideological positionalities of contesting actors. In addition, this study aims to discuss the relationship between the distinctive UBI models and theoretical constructions of justice.

It is necessary to underline that the scope, amount, and duration of UBI models differ significantly depending on the political projections of relevant actors. For instance, those who aim to alleviate poverty without putting too much strain on the current budget propose a modest version of UBI, whereas those who aim to eradicate “absolute poverty” propose a generous version of UBI with higher taxes on the upper classes. Neoliberals and neo-conservatives propose a modest UBI model to replace the current welfare state, while socialists envision a generous UBI model to supplement existing social programs. Many social democrats and socialists opt for progressive taxation schemes, placing the weight on the shoulders of privileged classes to finance UBI. While the former aims to downsize the public sector and increase market efficiency, the latter aims to reduce or, if possible, overcome capitalist exploitation.

In general, while liberals advocate for UBI based on (individual) freedom and autonomy, economic efficiency, and market ideology, leftists support UBI to improve the conditions of working-class (Van Parijs and Vanderborght, 2017). Social democrats and socialists believe that UBI would increase the bargaining power of working-class. It is expected that UBI enable workers to make choices between different options or exit the labour market at all. Especially the possibility of exit allows workers to decline low-paid and/or degrading jobs (Calnitsky, 2017 and 2018). Socialist feminists argue that UBI is a reformist solution for compensating “unseen” economic contributions and unpaid domestic labour of women, as well as reducing existing hierarchies and inequalities within the household (Weeks, 2020). Egalitarian-libertarians advocate UBI to ensure that all citizens have access

to decent living conditions. Accordingly, UBI would not only meet people's most basic material needs but also eliminate the distinction between "deserving" and "undeserving" poor that prevails in existing social programs, remove the social stigma attached to poverty, and make a dignified life possible for all citizens (Van Parijs and Vanderborght, 2017). Yet not all leftists support the idea of UBI. Especially socialists who are sceptical of UBI argue that it is a neoliberal cooptation project against the backdrop of the dismantling of the welfare state (Zamoro, 2017). These critics remark that UBI neither aims to eliminate capitalist exploitation nor intends to end oppressive working conditions completely (Resnikoff, 2023). Considering the dramatic polarization between capital and labour, UBI is a "harmonious compromise" for ensuring the reproduction of capitalism (Straubhaar, 2017). Rightists aim at downsizing and particularizing the welfare programs and reducing the extent of the paternalistic relationship between the poor and the state (Murray, 2016; Jackson, 2017; Standing, 2017; Van Parijs and Vanderborght, 2017). Neoliberals support UBI through the economic efficiency discourse, arguing that replacing the welfare state with the UBI model would be less costly and have less disincentive effect on recipients. Nevertheless, not all rightists support the idea; instead, many point out the drastic cost of any UBI program covering all citizens and its potential to create a disincentive to work.

Looking at these diverse views and reasonings, it is not difficult to see that there are serious tensions and polarizations in the UBI debate. This study in this regard discusses various discourses and articulations of contesting actors/groups on basic income. Specifically, it aims to compare and contrast the capitalist/regressive and anti-capitalist/progressive basic income modalities by addressing the techno-capitalist, libertarian/neoliberal, social democratic and socialist interpretations of UBI. In the conclusion section, it briefly summarizes both pros and cons of these UBI versions at hand.

Techno-Capitalist UBI Model

Many observers state that technology elites have been the champions of UBI in the last few decades (Schneider, 2015; Smiley, 2015). Some of the famous tech elites, especially from Silicon Valley, advocating the necessity of UBI in the 2010s are Elon Musk (the owner of Tesla), Mark Zuckerberg (the founder of Facebook), Evan Spiegel (CEO of Snapchat), Marc Andreessen (creator of Netscape), Richard Branson (the founder of Virgin Galactic), GERAL Huff (Tesla's chief engineer), Robin Chase (CEO of Zipcar), Leiha Janah (founder and CEO of Samasource), Peter Diamandis (Chairman of Singularity University), Jeremy Howard, Kathryn Myronuk and Neil Jacobstein (tech experts and entrepreneurs from Singularity movement). In 2016, a group of famous American technology entrepreneurs and philanthropists, including but not limited to Sam Altman (the President of Y combinator) and Chris Hughes (the co-founder of Facebook), established the *Economic Security Project* and invested about 10 million US dollars to test the UBI project. Within the scope of the *Economic Security Project*, more than 38 thousand people benefited from a total of 100 guaranteed income pilots that have been implemented across 30 American states. Techno-capitalists continue to spend millions of dollars to research and develop UBI pilots and/or similar guaranteed income projects. One of the most significant UBI pilots led by techno-capitalists is Y-Combinator's "Making Ends Meet" project (in collaboration with the University of Michigan Survey Research Centre) that covers 1000 people with monthly payments of 1,000 US dollars per person and the total budget of 60 million US dollars (Sanchez, 2018).

The primary reason behind Silicon Valley's support for the UBI model is that the technological transformations will lead to dramatic unemployment in the near future. It is expected that the "fourth industrial revolution" will impose new regimes of accumulation and dispossession. The technological unemployment discourse, which states that robots, algorithms, and artificial intelligence (AI) will lead to

displacement and/or disappearance of work in the coming decades, has lately become very popular. Especially, “the fear of automation,” “fetishism of robotics,” “secular stagnation” and “end of work” discourses have been widely circulated by technology gurus and elites (Mercantente, 2018). A recent empirical study on Twitter users’ support for UBI confirms that the discourses of fear of automation *vis-à-vis* technological unemployment, which is fuelled by figures like Scott Santens, a famous UBI activist among tech-entrepreneurs, has become very widespread in advanced capitalist countries (Kuran, 2022). In general, technological transformations have raised many concerns about employment, wages, poverty, and inequality. Regarding these concerns, the techno-capitalist class in Silicon Valley offers UBI as a remedy for the coming decades (Sadowski, 2016). They believe that UBI will provide “relief” in the face of rapid technological changes. Technology elites argue that there is no need to fear robots, algorithms, and AI when UBI or such policies are applied. They instead suggest that the robotization process will lead to a post-work utopia, in which those who are able to control robots could spare time for themselves to relax and pursue creative endeavours (Danaher, 2017).

The second reason behind the techno-capitalists’ support for the UBI model is about human capital, which is seen as the basis of entrepreneurship and creativity. Through a guaranteed income, individuals will have sufficient financial means to cultivate themselves and flourish their entrepreneurial abilities. Technology elites expect that UBI would boost the entrepreneurial capacity of the society, as qualified individuals are able to take more risks, establish their small start-ups and make investments in the technology sector. From this perspective, UBI becomes an individual “investment” rather than a social policy against emerging inequalities. The articulation of UBI as a form of (human) *capital* can be interpreted as the corporatization of social policy. This implies a shift from a rights-based social security system to a capital-oriented security regime.

There is a possibility that technological transformations will create social discontent and unrest, especially among the low-skilled working population, in the future. In this context, UBI is identified as a project that might turn into a cooptation tool of the new capitalist regime in disciplining and regulating the poor, who tend to be a source of unrest and, thus, a subject of social upheaval. Therefore, by following Cloward and Fox-Piven's (2012) interpretation of welfare policies, one can rightly criticize the UBI model as a technical fix designed for containing and absorbing potential social unrests in the future. For these reasons, it can be argued that the UBI model advocated by techno-capitalists envisions a "regressive redistribution" (Sadowski, 2016).

Libertarian/Neoliberal UBI Model

Libertarians believe that UBI promotes individual autonomy and agency by providing the financial means to individuals to meet at least their basic needs (Zwolinski, 2013a, 2013b and 2014; Lenczewska, 2021). UBI can potentially eliminate absolute poverty, which is incompatible with individual freedom. From a libertarian perspective, individuals who achieve material freedom are no longer subject to a lifestyle imposed by the state and other powerful individuals or groups. As UBI provides individuals with lifelong financial security, independent of employment relationships and career choices, individuals have the freedom to determine their life choices and realize their own conception of happiness.

As the most significant figure of 20th-century libertarianism, F. A. Hayek supported the idea of basic income (Zwolinski, 2013b). Hayek advocates not only market freedom (such as in the form of private property rights) but also the full-fledged autonomy of individuals. He argues for a truly liberal condition in which individuals are autonomous from the coercion of both the state and other groups and individuals (Gamble, 2015). Hayek suggests that individuals need material autonomy in order to be free from the domination of the state and society. In this context, a UBI policy involves the potential to

eliminate domination and dependency relations by providing material freedom to individuals. In this sense, UBI is compatible with the Hayekian conception of individual autonomy. In addition, Hayek (1944) asserts that the real threat to individual freedom and autonomy is central planning through “big government.” Current social assistance and welfare programs depend on a “big government” with a centralized disciplinary power. Instead, UBI could achieve individualistic welfare with a form of minimal and decentralized state. In explaining why Hayek supports the idea of UBI, Zwolinski (2013b) states that,

A basic income gives people an option – to exit the labour market, to relocate to a more competitive market, to invest in training, to take an entrepreneurial risk, and so on. And the existence of that option allows them to escape subjection to the will of others. It enables them to say “no” to proposals that only extreme desperation would ever drive them to accept. It allows them to govern their lives according to their own plans, their own goals, and their own desires. It enables them to be free.

According to libertarians/neoliberals, all means-tested (i.e., conditional) welfare programs violate the primary market principle that is based upon the efficient allocation of resources through the price mechanism (Preiss, 2015). This problem disappears in the case of UBI, as it is provided to all “consumers” without condition. Moreover, almost all social assistance programs in developed countries build a paternalistic regime, which naturally disrupts the free market logic. Friedman’s proposal of a negative income tax, which is considered as one of the most important variants of UBI in retrospect, aims to ensure the functioning of the free market and efficient allocation of resources. According to Friedman, current welfare regulations and bureaucracy, which he believes to be very counterproductive, could be thoroughly eliminated through a negative income tax (Preiss, 2015). However, Friedman’s basic income radically differs from other variants,

as he strongly opposes any model of progressive taxation to fund UBI. He argues that such a taxation policy would prevent the operation of market mechanisms and discourage potential investors in a country.

The Cato Institute, a distinguished libertarian/neoliberal NGO in the US, proposes to replace all existing welfare programs with a single basic income program (Cato, 2014). According to Zwolinski (2014) from the Cato Institute, the American welfare state is very complex and expensive. Tanner (2012), also from the Cato Institute, remarks that currently, there are at least 126 different social programs at the federal level in the US, with a total cost of more than 668 billion US dollars annually. If local social assistance programs are included and the total cost increases by another 284 billion US dollars, which brings over 1 trillion US dollars in annual total welfare spending, which is equivalent to providing 20.000 US dollars per poor person. Based on this calculation, Zwolinski (2014) argues that a UBI model is a better option compared to the burdensome welfare state in the USA. In addition, Tanner underlines that the bureaucratic and operational costs of welfare programs at the federal level are very expensive in the USA. A UBI program, instead, can be administered in a much simpler way. By proposing a UBI model, the Cato Institute's thinkers aim to downsize the current welfare spending. The total cost of UBI would be lower when substituting current welfare programs. Thanks to UBI, libertarian thinkers propose to eliminate the subsidies for higher education, lower interest rates on mortgages, tax reductions on retirement savings, and so forth (Cato, 2014). Zwolinski (2014) specifically emphasizes that libertarians would prefer UBI as a substitute rather than an addition to the existing welfare state.

Social Democratic UBI Model

The deindustrialization processes *vis-à-vis* the rise of post-Fordist paradigm have destabilized employment relations and led to a crisis of social reproduction in the Western countries since the 1980s. Social democrats began to seek

new solutions to the flexibilization of production as well as the precarization of labour. In this context, alternative social policy instruments such as UBI have become attractive to social democrats (Jackson, 2017). Besides, a UBI policy is considered a rescuing tool to pull social democracy out of its own crisis (Pitts et al., 2017).

Social democrats' support towards UBI can be understood through Polanyian "double movement" theory, which states that the historical development of capitalism is based on the dialectical relationship between market and society. In *Great Transformation*, Polanyi (1944) depicts the embeddedness of economic relations (even the exchange principle itself) within social relations. "Market society" is an exceptional social construct that serves the functioning of a capitalist economy in which society has continued to struggle against destructive measures of capitalism. It is possible to observe the dialectical relation between economic and social forces throughout the history of capitalism. For instance, the repercussions of the Great Depression in the form of economic stagnation, mass unemployment, and working-class unrest in the 1930s dealt a heavy blow to the *laissez faire* idea and neoclassical/neoliberal economic theory. The Keynesian welfare state, which was supported by extensive social policy measures and gained prominence in advanced capitalist countries in the post-war period, could be interpreted as a countermovement of society for protecting itself against the perils of the market.

Standing (2007) advocates UBI from a Polanyian perspective, arguing that the global society is currently experiencing the "Second Great Transformation." Similar to the 19th century, rapid commodification processes on land and labour occurred in the past few decades. In this context, Standing (2007) suggests that UBI is a necessary protective measure for society, especially considering the social democratic claim of decommodification of labour. In order to ensure the embeddedness of the economy within society, it is necessary to develop well-functioning social protection systems,

redistribution policies, and regulatory institutions through which the working poor are protected.

From a social democratic standpoint, UBI could provide some degree of autonomy to working-class. Social democrats believe that “everyone needs a basic security in order to be able to work, to be responsible and to develop their capacities and capabilities” (Standing, 2007: 19). From a social democratic perspective, any social assistance program should provide meaningful material welfare for enabling people to make rational decisions, and its provision should be ensured in the long run for preventing the arbitrary interventions of authorities. Social democrats believe that the UBI scheme is more inclusive and beneficial compared to alternative social assistance programs (such as food vouchers, categorical benefits for single mothers, disabled and elderly people, and temporary wage subsidies).

Against the liberal criticism that assumes any UBI program would place a heavy financial burden on the state, social democrats argue that UBI is “not a matter of cost, but a matter of priority” (Standing, 2007: 31). In addition, social democrats draw attention to the “positive externalities” of UBI; arguing that it would induce a Keynesian effect on the general equilibrium of economy by multiplying consumption in the short run as well as increasing production and employment in the long run (Standing, 2007). More significantly, social democrats maintain that UBI would increase the bargaining power of working-class and improve employment conditions overall. By relying on an income guarantee, employees could reject low-paying jobs and/or adverse working conditions and take time to seek high-paying jobs and better working conditions. UBI is expected to increase the freedom and autonomy of workers through this option.

Nevertheless, some social democrats criticize UBI as it would lead to a retreat from the full-fledged welfare state. In case of trade-off between traditional social policies and UBI, policymakers might deflect the ideals of full employment, employment guarantee, labour market regulation, and

potential nationalization programs. Social democrats argue that the UBI model would be favourable only if these objectives are maintained.

Socialist UBI Model

In *Critique of the Gotha Program*, Marx (1875) depicts a communist society of abundance, in which productive capacity is fully realized, and the issue of alienation is eliminated. In a society of abundance, people would contribute to production to the extent of their own capacity and would receive what they need in the process of distribution. Some Marxists argue that there is no need to wait for “great social transformations” (Mercatente, 2018). Although the capitalist surplus has already been concentrated in the hands of a few, if distributed equally, the current level of global wealth would be sufficient to create a new society of abundance (Bastani, 2020). In this context, UBI seems to be the appropriate mechanism for the redistribution of global wealth. Van der Veen and Van Parijs (2006) argue that UBI provides a basis for the transition from capitalism to communism without an intermediary socialist step. In other words, UBI opens a window of opportunity for communist life under a capitalist society. This proposal, thereby, can be interpreted as a form of market-communism. While individuals receive a share of income according to their contribution to production under capitalism, individuals participate in both production and distribution processes according to their needs, yet again under market-communism. For socialists, progressive versions of UBI could ensure a dignified income for all working people and provide a basis for the decommmodification of labour to a large extent (Wright, 2005; Calnitsky, 2018).

Many socialists argue that the neoliberal accumulation regime that emerged in the 1970s and has become dominant until currently is about to end; yet there are differing opinions on the evolution of capitalist society regarding the processes of automation, robotization, and digitalization in coming decades. Some socialists argue that technological

transformations would lead to mass unemployment and disrupt social reproduction. There is a probability that technological unemployment will intensify discontent among the working classes in the close future. This potential discontent needs to be overcome or at least managed through state intervention in order to sustain the capitalist system. Considering the social reproduction in the process of technological transformations, some socialists criticize UBI as an instrument of cooptation in the transition to a new capitalist accumulation regime (Zamora, 2017). Skeptical socialists criticize UBI as a state-based intermediary mechanism to manage the conflict between capital and labour, especially as the issues of persistent poverty and unemployment have been rising for the last few decades. This perspective is based on an understanding that UBI aims to transform the confrontation between capital and labour to the [welfare] problem between the state and individual (Tonak, 2010). In other words, UBI does not aim to eliminate the conflict between capital and labor, but to alleviate poverty and unemployment by means of the state intervention. Therefore, skeptical socialists consider UBI as a regressive-reformist project to save the capitalist system.

Nevertheless, some socialist/Marxist scholars see UBI as a step towards a post-capitalist society. A leftist version of UBI, which provides a generous amount with progressive taxation, “is something akin to the move towards democratic socialism” (Calnitsky, 2018: 145). By stirring up the decommodification of labour and strengthening social solidarity not only among workers but also between unemployed, poor, and excluded sectors of society, UBI provides a material basis for the transition to socialism (Calnitsky, 2017 and 2018). Marx (1891) clearly illustrates that the organizing principle of capitalism is “wage labour”, meaning that workers have no other choice than to sell their labour power in order to make a living. UBI revokes this principle, as workers getting a liveable basic income could cease selling their labour. In this regard, socialists advocate UBI as it aims at “decoupling of the income of citizens from the obligation to work” (Mercantente,

2018) This condition makes UBI a more radical-progressive approach compared to existing social policies.

At this juncture, it is necessary to remind readers that the Marxist critique of capitalism is mainly concentrated on issues of exploitation, such as the appropriation of social surplus by capital, as well as alienation. Socialists believe that the issue of exploitation could directly be addressed through the nationalization of the means of production. Socialists also suggest that the problem of alienation would disappear once workers begin to democratically control the surplus they produce. Arguing that it is almost impossible to realize the grand project of socialism and eliminate class contradictions pertaining to capitalism today, Wright (2004) suggests a strategic UBI model to alleviate extreme inequality between capital and labour. He asserts that UBI does not only change existing power relations of capitalism in favour of working class but also leads to deeper transformations in the future (Wright, 2004). Through a basic income guarantee, individuals do not have to sell their labour power but opt for non-market-oriented, socially productive, non-commodified activities (e.g., arts, politics, and public services) or devote time to their genuine interests. Wright (2004) underlines that workers who count upon UBI could reject degrading and low-paying jobs and/or poor working conditions. UBI provides a possibility of “exit” from labour market, and through this way, it strengthens workers’ bargaining power against employers, increases the collective power of working-class, and leads to deeper social transformations in the future.

Following the steps of Wright, Calnitsky (2017) argues that UBI is not an “end” itself but an initial step towards a broader normative agenda. It is a progressive social policy instrument that can be used on the way to an egalitarian utopia. In interpreting the objectives of social policies, Calnitsky makes a distinction between “ameliorative reforms” and “emancipatory reforms” from a Marxist perspective.

Ameliorative reforms, like traditional welfare policies, are valuable because they provide direct material benefits and improve people's lives, which is a normative end in itself.[...] The concept of an emancipatory reform, on the other hand, refers to some social policy that may ameliorate a particular deprivation but does so in a way that pushes us closer to an underlying moral vision (Calnitsky, 2017).

In contrast to the ameliorative reforms, the emancipatory reforms aim to disrupt the existing balance of power between capital and labour and strengthen the position of poor and working people against capitalist class and its authorities. UBI has “ameliorative as well as emancipatory significance” and should be “part of a left normative agenda” (Calnitsky, 2017), as it currently provides an exit option from capitalist exploitation and domination relations. UBI provides a possibility for employees to get out of abusive relations, poor working conditions, and patriarchal domination in workplace. UBI creates a “social transformation” in two major ways: “the power of exit” and “the institutionalization of solidarity” (Calnitsky, 2017). Basic income provides both negative freedom (freeing people from obligations) and positive freedom (facilitating people to pursue what they want). Therefore, UBI can be considered an anti-capitalist economic alternative as well as an instrument of major social change.

Still, there are many criticisms of UBI from a Marxist perspective. It is argued that UBI does not aim to eliminate capitalist exploitation at all but to smooth the tensions and inequalities between capital and labour. In this sense, UBI is a “top-down palliative measure for the miseries of capitalism” (Mercantente, 2018). Gourevitch and Stanczyk (2018) argue that the progressive version of UBI is neither feasible nor achievable, considering the budget constraints and potential opposition of the capitalist class. They argue that a generous basic income can only be achieved through an organized

working-class struggle. If this is the case, it is better to organize the working-classes for the ideal of socialism than UBI model.

In contrast to Calnitsky's argument that UBI aims to empower working-classes by providing an exit option to them, socialists who are skeptical of UBI reminds that this project is mostly compatible with the operating logic of neoliberal capitalism, which is based on the flexibilization and precarization of employment relations (Mercantente, 2018). If employees relying on a basic income guarantee might have part-time and/or short-term jobs instead of formal permanent employment, then the insecurity would be the norm in the labour market. In this sense, UBI may precipitate the flexible labour conditions necessary for the functioning of neoliberal capitalism. It is also necessary to note that the proliferation of flexible labour would lead to the individualization of social struggle and the fragmentation of working-class. In this sense, UBI shifts "the terrain of class conflict to that of public policy and citizenry" (Mercantente, 2018). This could help capitalist classes to maintain its control over working-classes without involving too much trouble. Therefore, those skeptical socialists offer organizing working-classes in traditional ways (e.g., unionizing) instead of pursuing a UBI dream, as they think better jobs and dignified income could only be possible through the persistent working-class struggle.

Moreover, socialists criticize UBI for being a monetary and market-based solution (Jäger and Vargas, 2023). Monetary assistance to the poor serves to expand the sphere of markets and lay down the necessary conditions of "market society" (Polanyi, 1944). It is necessary to underscore that, in all UBI formulations, market distribution continues to be the central mechanism. By reminding the fact that neoliberalization basically means commodification and marketization of common goods and public services, UBI would further serve the neoliberal capitalism. UBI aims to reproduce the market logic by promising a sufficient income to all (Mercantente, 2018; Resnikoff, 2023). However, the real issue for socialists

is to replace the exchange principles of markets in order to overcome capitalist society. Resnikoff (2023) suggests that

UBI's appeal was premised not on capitalism's end, but the supremacy of markets. Nowhere was this clearer than in UBI's surprising discursive turn to the Global South. [...] Far from ushering in a postindustrial, post-work, postcapitalist society, in India, Mexico, and Brazil, UBI proved itself a useful method for intensifying market relations without actually investing in development.

Furthermore, socialists also remind us that the capitalist mode of production depends upon not only the active labour force but also the reserve army of labour, which limits the improvement of wages and has a disciplinary effect on the employed sector (Mercantente, 2018). There is a possibility that UBI would encourage people to withdraw from the labour processes and hence increase the unemployment rate. From this perspective, the full employment policy could be more meaningful than UBI. It is argued that capitalist exploitation relations and discipline of labour will remain the same without a full employment policy and extensive transformations.

This discussion demonstrates that socialists have contradictory opinions towards UBI. Socialists that favour and advocate for UBI underline that the model provides an exit option and has a potential to trigger “the cycle of empowerment” (Calnitsky, 2018). This group believes that as power relations begin to evolve, UBI could create radical transformations in the future (Wright, 2004; Calnitsky, 2018). Those socialists criticizing UBI remark that it is compatible with the operating logic of neoliberal capitalism, as it particularizes the social struggle and has a potential to serve for flexibilization and precarization of labour (Jäger and Vargas, 2023).

Conclusion

The goal of this study was to investigate and summarize the capitalist/regressive and anti-capitalist/progressive

interpretations of UBI. As dialectical dynamics in the history of social policy illustrates, if social democrats and socialists do not struggle for the progressive version of the UBI that envisions both material freedom and decommodification of labour, the capitalist classes would eventually implement the regressive version of the UBI for securing only their own interests.

As it is discussed, one of the main aims of the capitalist UBI is to dismantle the welfare state and to achieve economic efficiency by expanding the spheres of the market and maintaining the hegemony of market ideology. The possibility of the disappearance of welfare gains and social rights through a UBI policy would be devastating for the working-classes. It is not difficult to see that existing inequalities will be exacerbated in case UBI replaces existing social programs designed for the poor, resulting in a dramatic loss. A UBI model can only be meaningful for the poor and working-classes if it is designed as a substitution for current welfare programs. This underlines the necessity to struggle for an anti-capitalist/progressive version of UBI.

It is necessary to underline that some of the criticism of socialists towards UBI are unjustified and overly skeptical. While aiming for a major social transformation (through a revolution), socialists ought to strive to improve the conditions of the working-classes at the present moment, keeping in mind that prolonging the suffering of working-classes is less humane. As Calnitsky (2018) notes, social policies might involve the risk of sinking into a trap of neoliberal capitalism and falling short of meeting socialist criteria, yet they could still be valuable for working-classes.

It is widely believed that basic income presents a clear and present danger of cooptation. This is true; it is entirely possible to imagine it being co-opted. The same is true for a jobs guarantee, Roemer's coupon socialism, strengthened unions, Medicare for All, and every ambitious but plausible scheme to reorganize socioeconomic life for the better (Calnitsky, 2018).

UBI should be supported as long as it makes the lives of the poor and working-classes easier. As Wright (2004) and Calnitsky (2018) rightly point out, the disappearance of the distinction between “deserving” and “undeserving” poor” through a UBI policy is a remarkable improvement. Social democrats and socialists have to fight back against the capitalists’ containment and absorption of the UBI project instead of totally eliminating the possibility of change.

As seen in the history of social policies, if socialists and social democrats do not tilt the scale in favour of a progressive version of UBI, the capitalist class would put a regressive version into practice. In this context, the initial aim of social democrats and socialists should be proposing a truly generous and inclusive UBI. The progressive version of UBI could both reduce existing inequalities and bring about broader reforms and radical changes in the future. As Calnitsky (2018: 153) remarks

[O]nce passed, [UBI] can change the landscape of social struggle in ways that are favourable to popular forces. Shrugging off policy objectives that sit somewhere in the intermediate space between a socialist economy and a ten-cent raise is a strategy unlikely to inspire broad working-class organization.

Therefore, in evaluating UBI, it is necessary to consider both its immediate positive impact (i.e., improving the current conditions of working-classes) and its contribution to potential radical transformations (i.e., creating a possibility of a democratic economy) in the future.

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Drawbacks of the Rawlsian Theory of Justice: The Issue of Structural Inequalities and the Question of Operationalization

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Introduction

John Rawls, the pioneering political philosopher of the last century, introduced the concept of social justice in relation to liberal individualism, igniting a long-lasting debate on the possibilities of justice in real life. His seminal work, *A Theory of Justice* (1971), proved groundbreaking not only among philosophers but also among political scientists. It presents “a comprehensive theory of rights and moral principles suitable for a liberal society” (Wolin, 1996: 97). This work was constructed upon the shared assumptions of the developmentalism paradigm, the New Deal, and liberal welfare regimes (Wolin, 1996: 113). Rawls’ subsequent book, *Political Liberalism* (1993), outlines the political and constitutional prerequisites for his theory of justice. It is likely to argue that this latter work echoes the victory of the liberal-capitalist world order against the socialist alternative. This article argues that Rawls’s theory of justice overlooks the structural tendencies of inequalities inherent in liberal societies and historical contexts of inequalities, conflicts, and antagonisms

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in its formulation of “original position” and “difference principle.” This paper further contends that the concepts of “original position” and “difference principle” are hard to interpret in an operational way considering the organization of social structure. Lastly, it is argued that, despite his claims to the contrary, Rawls establishes his theory within a comprehensive doctrine of his own. Prior to an elaborate critique of Rawlsian theory of justice, the main outlines of his theory will be sketched, and his presuppositions will be explored.

Rawlsian Theory of Justice in a Nutshell

It is necessary to remark that the sociopolitical formation that Rawls develops his theory of justice upon is a constitutional liberal democratic state. As it is recognized in *Political Liberalism*, which can be interpreted as the political remedy of the moral vision of *A Theory of Justice*, Rawls elaborates his theory in relation to and under the constraints of “modern constitutional democracy” (Rawls, 1993: 11). As a matter of fact, Rawls’s theory of justice can be called “historical” in the sense that his concept of justice presupposes the conditions of a liberal democratic society, in which an idea of reasonable pluralism prevails – in Rawlsian scheme, a particular historical stage of “well ordered society” (Rawls, 1993: 14). To put in another way, the Rawlsian justice necessitates the establishment of mature conditions of liberal democracy.

The conceptualization of “justice as fairness” is the central tenet of *A Theory of Justice*. What Rawls outlines as “justice as fairness” has two dimensions: First, the liberty principle, which comprises the basic liberties of citizens such as “political liberty,” “freedom of speech and assembly, liberty of conscience and freedom of thought,” and other civil rights (Rawls, 1999: 53); and second, the equality principle or distributive justice, which is based on the arrangement of socioeconomic inequalities. The first part of the equality principle envisions the maximization of the benefits, wealth and/or income of the least advantaged individual. According to Rawls, “the social order can be justified to everyone, and in particular to those

least favored; and in this sense, it is egalitarian” (Rawls, 1999: 103). This condition is generally acknowledged as the difference principle in Rawlsian terminology. The second part of the equality principle consists of fair equality of opportunity, that is to say, “positions and offices (are) open to all” (Rawls, 1999: 53). In elaborating the hierarchy of the liberty principle and equality principle, Rawls argues that “these principles are to be arranged in a serial order with the first principle prior to the second.” “This ordering” says Rawls, “means that a departure from the institution of equal liberty required by the first principle cannot be justified by, or compensated for, by greater social and economic advantages” (Rawls, 1999: 53-54).

At this juncture, it is necessary to underline that distributive justice in the Rawlsian perspective depends upon the hypothesis of “original position” and “veil of ignorance”. Rawls asserts that “the natural distribution is neither just nor unjust; nor is it unjust that men are born into society at some particular position. What is just and unjust is the way that institutions deal with these facts” (Rawls, 1999: 87). In designing the equality principle or distributive justice, society regards “arbitrariness of fortune” as the object of “Justice”, and attempts to satisfy conditions of the least advantaged individuals, as it is the “common/mutual” benefit (Rawls, 1999: 88). From this perspective, the equality and difference principle are reasonable for and appealing to more advantaged and less advantaged individuals. Therefore, the original position, which prescribes social cooperation and mutual benefit, forms the basis of the Rawlsian “contract theory” (Rawls, 1999: 105). The contract theory, in line with the traditions of Hobbes and Locke, forms one of the central pillars of Rawls’s theory of justice. Apart from that, the Kantian understanding of reason and utilitarian perception of man are two other critical pillars of Rawlsian theory (Wolin, 1996: 103). The Kantian reason played a major role in the Rawlsian scheme because “the reason” signifies a common ground where comprehensive doctrines reach a settlement beyond their limits (Wolin, 1996: 103). In addition, utilitarian rationality can be

argued as the departure point of Rawlsian theory of justice since “free and rational persons concerned to further their own interests” (Wolin, 1996: 104).

The Issue of Structural Inequalities

It can be argued that the structural inequalities as well as historical context, have been undermined in the original position in Rawlsian contract. As Wolin underlines, in the abstract and ahistorical moment of signing a contract, actual inequalities are suspended by Rawls (Wolin, 1996: 105). Therefore, the conflicts and negotiations between different classes and groups have been veiled in this scenario. The original position “eliminate(s) the bargaining advantages that inevitably arise within the background institutions of the society from cumulative social, historical, and natural tendencies” (Rawls, 1993: 23). Historical and social contingencies are being left out temporarily during the moment of signing contract. In his consideration of the original position, Rawls disregards the structural inequalities inherent in capitalist society. Thereby, historically disadvantaged individuals/classes become invisible. It is not implausible to argue that Rawls considers the issue of justice from the perspective of historically and economically advantaged individuals/classes. It is seen that “advantaged” actors choose the principle of justice (“difference principle”) in favor of the least advantaged due to the fear of losing their own well-being.

As Wolin suggests, Rawls does not address the persistent inequalities (“corporations, elite universities and colleges, centralized governmental bureaucracies, the mass media”), instead he focuses on “the values of *res publica*” (Wolin, 1996: 101). Although socioeconomic inequalities are acknowledged to some extent by Rawls, they are not as significant as basic liberties and rights (Wolin, 1996: 102). What counts in the Rawlsian contract is utilitarian rationality and Kantian reason. The inequalities derived from ethnicity, gender, and historical differences are left out in Rawlsian analysis – only they are recognized nominally in the constitution. Rawls defines

his preoccupation as the issues of “basic religious and political liberties and the basic rights of citizens in civil society”, and he advocates his disregard of the issues of “democracy in the firm and the workplace... redistributive justice... environment” (Wolin, 1996: 105). Especially in *Political Liberalism*, Rawls turns a blind eye to class conflicts and power relations inherent in the capitalist social formation (Wolin, 1996: 105).

It seems that Rawls does not aim to eradicate the actual inequalities that are “consistent with equal liberty and fair equality of opportunity” (Wolin, 1996: 109). The socioeconomic inequalities in the Rawlsian perspective are designed “to the greatest benefit of the least advantaged members of the society” (Rawls, 1993: 6). Therefore, by improving the benefit of and advancing the utility of the least advantaged, inequalities are being approved. The extent of the inequalities between the most advantaged and least advantaged has been undermined. For instance, the great disparities in income distribution are not a matter of political justice as long as the capitalist system provides some minor benefits to the poor and disadvantaged individuals. Therefore, it is plausible to argue that Rawlsian justice promotes socioeconomic inequalities in favor of social cooperation and contract. The initial inequalities and historical advantages due to the original position, such as cultural capital in the Bourdieusian sense, have been veiled by Rawls. The historical and structural inequalities are inevitable components of Rawlsian justice in the original position. It can be argued that the Rawlsian presupposition of the inevitability of inequality is derived from the liberal paradigm. The rights and liberties have priority over actual inequalities in a liberal paradigm. “Rawls emphasizes frequently that political liberty occupies a higher plane than economic rights; the latter are less significant and not to be included in formulating basic constitutional principles” (Wolin, 1996: 111).

Today’s capitalist economic and industrial infrastructure allows for an exponential expansion of the wealth produced and, in general, the wealth that exists in the world to reach

unprecedented levels. At the same time, this production process needs to be sustained and fed by certain forms of consumption. This very structure leads to the emergence and growth of deep inequalities between people. The relations of production allow such an economic structure to emerge through the accumulation of material resources in the hands of certain groups. Therefore, efforts to improve the situation of the least advantaged do not find a place in the ethos of capitalism (Freeman, 2018: 23). In a social structure where mechanization and technicalization have accelerated to such an extent and where people's consumerism rather than their productivity has come to the forefront, is pursuing the maximum benefit of the least advantaged people an ideal that those with the resources of social power would desire or consent to? Rawlsian theory, therefore, requires some fundamental transformations in the economic system and in people's understanding and practice regarding social order.

Under capitalist relations of production and consumption, an almost constant fact in the distribution of general wealth across the population is that a very small proportion of the population owns a very large share of the national wealth. If principled decisions to improve the conditions of the least advantaged do not result in a change in this distribution of wealth, it will be very difficult to maintain a reasonable level of inequality. Freeman argues that Rawls had in mind a property-owning democracy, not a capitalist one, with a more balanced and wider distribution of material means (Freeman, 2018: 17). But the transformation of the current economic structure into one with a wider distribution of material wealth would require centralized intervention or serious limitations and control over economic activity. The concentration of material means in certain hands can be observed in social structures of different periods. This is related to people's motives for engaging in economic exchange, namely the pursuit of profit. Therefore, if a person who wants to make a profit and increase the material means at his disposal gains more material means after a certain point, and this will disrupt the social

balance, the intervention of the authority is required here. At this point, the question of whether there may be a conflict between fundamental rights and freedoms and the difference principle comes to the fore.

The Problem of Operationalization

When deciding on the principles of justice, the parties in the original position will not have any knowledge of their position and status in society. However, having knowledge of what the social structure is like and being aware of the advantages and disadvantages that each group has, the basic principles of distributive justice “in terms of which later claims to the entitlements will be determined” will be chosen (Goldman, 1976: 847). If the general principles to be determined at this point are to be applied as general principles in different matters, a general advantage scale must be made between social groups. The positions on this scale of advantage should be the same in all cases of social justice so that the position of a group helps to decide the policies to be applied to it. In practice, beyond the difficulty of determining the least advantaged group, we can see that the advantage status between people or groups may vary within the framework of different problems. For example, a person with a very high income may suffer from a disease that is very difficult to treat. Or someone whose income is barely enough to make ends meet may own his home. Or someone who lives in their own home and has the opportunity to earn a living may not have sufficient opportunities in many areas of social life because they live in an isolated neighborhood. Therefore, a claim such as determining whether people are absolutely advantaged or not may not constitute a meaningful framework when the practical situations of social life are taken into account.

Rawls’ theory starts from the point of being in a hypothetical original position when deciding on principles of justice. However, the limitations of our ability as decision-making actors to make such a decision while avoiding knowledge of the reality of social life raises a question. If a decision is to be

taken today at the point of putting theory into practice, we need to question our capacity to exhibit such behavior with the knowledge and emotions we have as human beings, even if we decide in principle to act as if we are behind a veil of ignorance. It cannot be taken as a given that our desire to protect the conditions we have in society, and our feelings of envy towards other positions, will allow us to restrict ourselves to certain benefits in a world where the socio-cultural environment we live in promotes dreams of an unlimited future.

The legitimation of inequalities in the Rawlsian scheme can also be explained in direct relation to “the difference principle.” The question at stake is, what if the expectations of the least advantaged have always been narrow and limited due to historical processes. Upon this condition, it can be easy to satisfy the expectations of the least favored by small contributions and credits. Yet the urgent issue is the upper limits of wealth, income, and social benefit. By neglecting the upper limits and distribution of wealth/welfare, inequalities become deeply structural in Rawlsian political justice. At this juncture, Wolin describes, Rawlsian justice as “constitutional equality tempered by *richesse oblige*, by the duty of the powerful to ameliorate the condition of the worst-off, while being careful not to jeopardize in any degree the relative power of *richesse* or increasing that of those Proudhon called *the most miserable classes*” (Wolin, 1996: 112). It can be argued that rich classes/groups relieve their “guilt” by paying small contributions to the poor and legitimate their wealth in reference to “the theory of justice.” This can be called the justification of inequalities in the original position.

How to determine the least advantaged group is a controversial issue. Rawls stated in his early work that this group would be determined according to its own economic conditions; later in another text, he proposed family and class ties, natural endowments, and luck as appropriate criteria (Weatherford, 1983). It is claimed that there is no problem in finding the least advantaged group since this group does not refer to specific individuals in society but is expressed as

a representative group (Schaller, 1998: 371). Being advantaged or less advantaged is not a characteristic of individuals but of social positions in the social structure. In this case, if the advantages of these positions can be identified in the original position, the least advantaged group will also be identified with its conditions. Rawls gives a group of unskilled workers or a group with an income of half the median income, as examples (Rawls, 1999: 84).

The application of the difference principle through a representative entity that is not sensitive to the particular circumstances of individuals poses a problem since the policies that would arise from this principle would be applied to real people and not to representative entities. The representative groups that we will identify may prevent the implementation of a balanced social justice policy by eliminating the differences between people who fall into this group because they meet certain conditions. In a world where even people working in the same position in the same workplace, let alone people in the same income scale, can differ in terms of the social goods they have, achieving social justice through representative groups seems to be a difficult ideal to achieve. Even if we assume that individuals or groups determined on the basis of more factual data are taken into account, rather than vaguely defined groups within the social structure, determining who is the “least advantaged” does not seem to be an easy task (Altham, 1973).

Social groups are not entities that exist in nature. They are a matter of how we interpret society and according to what criteria we distinguish it. Since people and, therefore, societies are not static entities, the state of social groups is in a state of constant, if not radical, change especially today, when production and consumption processes are changing rapidly, social structures are dissolving and being rebuilt with an increasing speed. In this respect, the position of social groups on the advantage scale may change. Of course, one group will not suddenly become the middle-ranking or the most advantaged group while being the least advantaged one before.

However, when it comes to constructing a social order by setting the benefit of the most deprived group as a criterion, any differentiation in the advantage scale that would change the ranking, even by one rank, can change the equation.

Moments of crisis in societies can also be evidence of the inadequacy of representative groups for a unit of analysis. Societies can experience socio-economic and political upheavals. Although not critical as radical crises such as war, which can shatter the social structure entirely, there are situations where the socio-economic balance can be shattered even if the social structure remains intact. Some of the situations we have recently experienced can be given as examples. In 2020, during the pandemic crisis that shook the whole world, there were radical changes in the conditions that many individuals and social groups had. When we examine it according to different criteria such as wealth, neighborhood and place of residence, type of labor force, age, etc., the pandemic affected every segment of society at different rates and in different ways. The negative consequences of this situation could have led to the differentiation of the least advantaged group if a system had somehow been established according to the difference principle. Again, being affected by social crises also revealed how primary social goods are differentiated. The new criteria and limitations for socialization and everyday practice that emerged due to the pandemic crisis suddenly became a situation that affected the whole society but shook some groups more fundamentally than others. Again, the recent earthquake disaster in our country, which caused great destruction in many cities, shook the advantage scale deeply. The housing crisis, which emerged in almost every city due to both the earthquake disaster and the economic crisis, but especially affected those living in big cities more, brought many people who would fall into different groups on the advantage scale together in the group of tenants. The radical solutions that people have resorted to in trying to find a solution to this crisis show that the issue of housing is in a position to affect people's entire future in any advantage assessment.

Altham argues that it is not functional to take the group as the unit of analysis in the application of the difference principle, arguing that groups can be divided into subgroups within themselves or that several different groups can come together to form a meaningful sociological entity under a larger group. A balancing effort that takes the individual into account against this would seem to yield a more understandable formula. However, beyond the ambiguity of the group due to the fact that it contains more than one person, there is also the difficulty of ranking the things that people have within the social structure (Altham, 1973: 75-77).

Rawls's assertion of the improvement of the conditions of the least advantaged as the main criterion in putting forward his theory provides a ground of legitimacy for his theory. If the main goal of a theory is to ensure that those who are the worst off on the social scale are better off, it would be a plausible proposal in terms of social justice. At the same time, however, when the goal of the theory is that people should be in a better system of inequality than they would be under possible alternative social systems, even if not the most perfect one, the difficult-to-confirm nature of this goal makes it harder to evaluate the theory (Freeman, 2018: 20). For one thing, it is impossible to know all possible social systems and their outcomes and to make comparisons accordingly. Moreover, it would be more persuasive for a theory to assert its value or validity from its own content and the nature of its proposals. If we take into account that this theory will constitute a principle at the point of policy-making, the justification of the theory could be proved through the nature of the policies that should be produced by taking into account different criteria and conditions in different areas. When we consider diverse policy areas in the context of the difference principle, we can see that the premise of maximizing the benefits of the least advantaged by taking into account the rights and freedoms of other social groups is not easily applicable. Considering different policy areas such as health, education, taxation, housing, and social services, it is possible to see the difficulty

in identifying the least advantaged group, and the possibility that policies may restrict the rights of other groups. This inadequacy arises from the fact that the difference principle is not a micro principle to be applied in individual policy areas or cases but a macro principle that aims to determine the basic structure (Freeman, 2018: 20). Individuals' place on the social advantage scale may change in different policy areas, but people will not always be in the same group. If the level of analysis is too general in a structure where the unit of analysis is so variable, nuances will be missed in the search for social order, and thus, social justice will not be achieved as desired.

According to the difference principle, inequalities are legitimate as long as they increase the benefits of the least advantaged group. However, the first principle that precedes this principle should not be ignored in this process. In other words, the existence of fundamental rights and freedoms and equality of opportunity are principles that cannot be replaced by the difference principle. However, as long as inequalities exist, it will be necessary to constantly verify whether the conditions required by the principle of equal opportunity exist (Freeman, 2018: 16). In other words, there is a tension between the inequalities rationalized by the difference principle and the principle of equal opportunity. Inequalities should not be so great as to limit the opportunities and influence of the least advantaged group, especially in some areas of social life (e.g., politics). However, is it possible to strive for equality of opportunity in all areas of social life, and is the level at which inequalities must be maintained a point that can be reached without undermining fundamental freedoms? Moreover, when inequalities reach the desired balance at a certain point, it is possible for this balance to be disturbed again by the preferences and actions of individuals or groups. Such an approach seems to require constant intervention in the social order unless the establishment of the balance one moment and its loss the next would be sufficient to establish social justice (Gläser, 2023: 127). This situation also seems to be a necessity with the nature of the economic structure we are in.

The Issues of Ranking, Measurement, and Abstraction

Rawls proposed three main areas as primary social goods to be taken into account when applying the difference principle. Power and privileges arise from social status, income and wealth, and social bases of self-respect (Arnold, 2012: 96). It is a difficult question how these items can be ranked in the context of representative groups or specific individuals/groups. While income and wealth may be relatively easy to use as a basis for a specific ranking because they can be represented by material data, the weights and full manifestations of the others make it difficult to rank them. In addition, it is also argued that these primary social goods are inadequate in that they do not include some that should be taken into account within the social structure. How the burdens of social cooperation, public goods, and other goods, such as the environment and cultural heritage, are distributed to different groups is an issue that needs to be taken into account when discussing redistribution for social justice (Koller, 2018: 477-479).

The definition of the primary goods brings about an ambiguity problem. Primary goods are benefits/things of limited but high value that are produced as a result of social cooperation and distributed through the basic institutional structure of society and that each individual would like to have more of (Koller, 2018: 470). In a broad sense, this definition has the possibility of covering almost all kinds of benefits and materials produced through social life. Beyond this, there is the possibility that some benefits/goods that are not necessarily based on social cooperation but which we can see as the most basic needs for human beings, such as shelter, health, and the supply of food needed to live, may not be characterized as primary social goods. Considering that in today's societies, the most deprived people in the disadvantaged group are deprived of these basic means of living, it is expected that the need to ensure a minimum level of human life should be prioritized over issues such as the power and privileges of vaguely defined representative groups. Therefore, the concept of primary social goods seems to be a phenomenon that needs

to be further clarified and expanded for the application of the difference principle.

Another issue with the concept of primary social goods is that they are not thought of as things that an individual or a social group possesses at a moment in time but are depicted within the framework of the life expectation of a representative group (Schaller, 1998: 375). We have already mentioned the difficulties in identifying representative groups and putting redistribution into practice. Defining life expectancy in terms of a vague expectation rather than the actual situations within the social structure not only trivializes existing inequalities and injustices but also highlights a criterion on which it is difficult to form a common opinion. Moreover, emphasizing the possible inequalities that may arise in the future or the benefits that may be provided to a group should not be more important than the problems in the current situation. This is because the benefits that a group may have in the future are benefits that do not exist and may never be realized for some individuals in that group. To be fair, a principle of redistribution that takes into account the current situation and how it changes over time can be proposed.

Rawls develops his theory of justice operationally, in an abstract manner. Instead of actual inequalities and injustices, Rawls suggests abstractions beyond the actual world. His theory, in Rawls' own words, "is abstract in the same way that the conception of a perfectly competitive market or of general economic equilibrium... it singles out certain aspects as especially significant from the standpoint of political justice and leaves others aside" (Wolin, 1996: 105). By calling for an abstract and ahistorical original position, Rawls undermines the role of historical conflicts and the burdens of memory in shaping the current conditions (of liberalism). In *Political Liberalism* as well as *A Theory of Justice*, the actors are depicted "solely as moral persons and in abstraction from contingencies" (whether they are rich or poor). Rawls assumes that actors have sufficient information while choosing the justice principle, and that makes their acts rational. However, as

Wolin underlines, “rationality is itself highly abstract because the choosing will be independent of historical, natural and social happenstance” (Wolin, 1996: 112). Therefore, it is not implausible to maintain that Rawlsian justice is “rational” in reference to liberalism, but it is “abstract” and “non-historical”. Yet, abstract thinking in the Rawlsian scheme has under- or mis-represented the historical experiences of conflicting and struggling social classes. Wolin further argues that “the most crucial omission from the original position is any recognition that a political society inevitably carries a historical burden as part of its identity, which it has committed past injustices whose reminders still define many of its members” (Wolin, 1996: 116). In the last analysis, Rawls’s idea of justice can be identified as contextless, ahistorical, and abstract political endeavor.

Apart from inequalities inherent in the theory of justice and ahistorical/abstract analysis of the Rawlsian scheme, Rawls maintains a comprehensive doctrine in spite of his claims against the limits of comprehensiveness. Rawls argues that the comprehensive doctrines (such as realism, idealism, materialism, and socialism, etc.) cannot reach an “overlapping consensus” on what constitutes justice (Rawls, 1993: 15). However, Rawls presents the theory of justice as a common ground beyond the limits of comprehensive doctrines, as Rawls believes that his theory transcends the boundaries of such doctrines. He claims that the peculiar character of the theory of justice is its political character, whereas “comprehensive doctrines of all kinds belong to what we may call the background culture of civil society” (Rawls, 1993: 14). That is to say, what differentiates Rawlsian theory is his emphasis on political; his theory does not belong to social or cultural spheres. He suggests that only in the political sphere comprehensive doctrines may reach into consensus. However, Rawls undermines the political association and insistence on comprehensive doctrines; and he neglects the political implication of these doctrines over justice. As a matter of fact, Rawlsian theory itself can be considered a comprehensive

doctrine: first, it presupposes a liberal-democratic society and imposes this model in order to establish justice; second, it presupposes reasonable, rational, and interest-seeking individual (a particular typology) as a departure point (that may be called “liberal egoism”) (Rawls, 1993: 19). That is to say, Rawls claims, even if his theory depends upon a particular comprehensive doctrine; its principles would be so general that it does not prevent an “overlapping consensus” (Rawls, 1993: 29). However, it is so naive to believe that such diverse, comprehensive doctrines, with their historical and epistemological divergences, can reach a consensus on Rawlsian justice – which has too many flaws considering its contextless and ahistorical character.

Conclusion

This study investigated how John Rawls’ theory of social justice interprets structural inequalities and whether it offers a viable theoretical framework to deal with these inequalities through its basic axioms. Rawls accepted inequalities as a phenomenon that cannot be completely eradicated from the social construct. In a situation where inequalities are inevitable, people should be satisfied with the situation they are in to ensure social peace and stability. Thus, the original position and the difference principle, which we can see as the pillars of Rawls’ theory, are the base for the claim that inequalities can be constructed at the most reasonable level.

Although the social contract literature on which Rawls’s theory is based has emerged as a critical stage in political philosophy in a certain period, the hypothetical original position and the difference principle (along with other principles of justice) are not convincing enough to legitimize the inequalities that people are or will be exposed to within the social stratification created by the existing capitalist regime. Accepting inequalities as a given is reasonable for a theory constructed within the liberal paradigm, but unless there is an attempt to transform the very nature of inequality-producing structure, extreme situations with harsh consequences

remain within the realm of possibility. Moreover, the fact that the criteria and basic principles put forward are not axioms that can be easily operationalized and that an overly general framework is drawn despite the intricacy of the social structure have been the drawbacks of the Rawlsian theory of justice. The claim to construct the basic structure of society as a general theory of justice, coupled with the possibility of inconsistency and unanswered questions on detailed issues, has led to a theory that raises question marks when practical policy areas are considered, even if it sounds plausible as a basic idea.

Despite all the question marks it raises, Rawls has brought the issue of social justice back to the center of political philosophy debates and prevented it from being an eccentric endeavor. His theory has led many thinkers from different backgrounds to contribute to the development of the debate with their criticisms and even to put forward their own theories. Therefore, we can say that Rawls's theory of justice is one of the most important attempts to provide a detailed analysis of a plausible alternative, even if it is not the perfect answer to the problem.

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Perspectivism as a Ground for Epistemological Equality in Nietzsche and Foucault

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Introduction

Nietzsche is definitely not a thinker of equality. In his oeuvre, he usually stresses the inequalities of things, and his philosophical taste favors hierarchies instead of equalities. For instance, he declares concepts as a result of an illogical operation, which is the equation of unequal things (Nietzsche, 1992: 83), to show their invalidity as a tool for truth. However, I think that his thoughts can legitimately be used for aims like eliminating inequalities, improving democracy, and supporting a more peaceful life in political terms. This possibility comes from his perspectivism, which he affirms permeates his writings (Nietzsche, 1968: 616)². When we accept perspectivism in the same fashion, we may find that it may serve as a solid ground for a philosophical defense of some important kinds of equalities.

In this paper, I will claim that Nietzsche's perspectivism can be thought of as a ground for supporting epistemological equalities. For this, I will first explain Nietzsche's idea of perspectivism and its relation to the issue of epistemological

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² In this section and the following one, references are to the section numbers whenever applicable.

equality. Then, I will claim that perspectivism helps us to think that every intellectual perspective is philosophically equal to each other. However, this will pose a threat that I will call “affirming the demon.” I will formulate this threat and offer Foucault’s thoughts as a solution to it. Finally, I will talk about Foucault’s usage of Nietzsche’s perspectivism, which gives way to defending epistemological equalities in a politically fruitful way, and finish to demonstrate my main argument.

Nietzsche’s Perspectivism and Epistemological Equality³

Perspectivism is an important component of Nietzsche’s philosophical battle with dogmatic metaphysical ideals. This thought, like his genealogical method, contributes to Nietzsche’s theoretical critique of traditional Western philosophy and serves as a tool for overcoming metaphysical challenges, like the (unchanging) “ground”: dogmatic “truths” that are widely accepted and taken for granted by the philosophical community. Apart from what just stated, perspectivism is Nietzsche’s ontological explanation of life, and it also has vital epistemological consequences. As a philosopher seeking his own truth, Nietzsche notices that “Platonism” in metaphysics makes the false claim that there may be an extra-perspectival “Truth” (with capital T) or the truth in itself, and he responds to this claim by using the very metaphysical concepts in a subversive way—with his polemical and aphoristic style that takes aim at the dogmatic nature of some dominant examples of classical western philosophy. Nietzsche seeks the roots of knowledge in human interests, which are founded on the human will for power, and criticizes the popular philosophical dogmatism that is at odds with the “flux of life” (and occasionally, we see him caricaturing it too). In opposition to this dogmatism, which he claims denies life, he proposes his perspectivist ontology as a background for his epistemological answer.

³ This and the sections that follow (except the conclusion) are largely the paraphrased versions of some passages from my PhD dissertation (Yildiz, N. 2019. *Nietzsche and Foucault on the Relation between Knowledge and Power*. Ankara: Doctoral dissertation, Orta Doğu Teknik Üniversitesi, Sosyal Bilimler Enstitüsü.). Block quotations are not paraphrased and taken verbatim.

According to Nietzsche's understanding of Platonic-Christian metaphysics, there is a fundamental and generally held belief that is seldom questioned in philosophers' minds. This is the "two-world" understanding, which refers to the philosophical systems that contain "true" and "apparent" worlds. In a fictitious state where they are perceived as though through the eyes of an omniscient and omnipresent God, the actual world is one in which things are as they are in themselves, in a fixed form, and freed from their relationships with other things. This kind of knowledge has been sought by disinterested subjects. The soul is pure (i.e., non-empirical and non-material) in that perspective. Nietzsche claimed that adopting a God's eye perspective in which everything is as itself (and beyond perspectives) is not only a life-denying idea but also a distortion of reality which can be characterized by constant becoming and can be interpreted only from a point of view. This is a lie for Nietzsche, which "has made humanity false and hypocritical down to its deepest instincts" (Nietzsche, 2007b: 2). As Nietzsche puts it, the "true world" is an invention, and it reduces the value of the only world that really is (ibid.: 8). Nietzsche's idea of perspectivism, as well as his philosophy in general, in this sense can be interpreted to be the "overturning of Platonism" (cf. Haar: 47). Nietzsche claims that "talking about spirit and the Good like Plato did meant standing truth on its head and disowning even perspectivism, which is the fundamental condition of all life" (Nietzsche, 2007a). The thing that Nietzsche tells us is that, in the real world, in epistemological terms, the existence of perspectives is inevitable; and every interpretation with the claim of knowledge must be performed from a perspective. The thing we call "spirit" (which is inextricably linked to the concept of "subject") can in no way be pure (since it is necessarily produced in an empirical way from its relations with the rest of the world. This picture entails a never-ending process of becoming) and in an equal level with materiality. In terms of moral philosophy, there is no good or evil in itself: this is because good and evil are empirical phenomena that

need other empirical phenomena to be explained since they share a worldly and temporal ground: a worldly standpoint, a relation of the interpreter (a subject as the perspective-setting force) with the world. Nietzsche writes:

You have heard me call for philosophers to place themselves beyond good and evil, - to rise above the illusion of moral judgment. This call is the result of an insight that I was the first to formulate: there are absolutely no moral facts. What moral and religious judgments have in common is the belief in things that are not real. Morality is just an interpretation of certain phenomena or (more accurately) a misinterpretation. [...] That is why moral judgments should never be taken literally: on their own, they are just absurdities. But semiotically, they are invaluable: if you know what to look for, moral judgments reveal the most valuable realities of the cultures and interiorities that did not know enough to 'understand' themselves. Morality is just a sign language, just a symptomatology: you have to know what it means in order to take advantage of it (Nietzsche, 2007b: 1).

In order for anything to be specifically good or bad, there must exist an interpretive power-center that observes and interprets it in accordance with its desire to cause that object to be one of those things. In order to comprehend it, that power-center must be situated in a certain way inside live reality (geographical, discursive, psychological, moral, etc.). It is the interpreter's perspective. From various angles, moralities are lies: when seen in the extra-perspectival manner of earlier metaphysics, they are particular subsets of immoralities (Nietzsche, 1968: 461). There is not any extra-perspectival "good" or "evil," in other terms. Thus, for Nietzsche, apart from its being the most dangerous one, Platonism is an "error" in the guise and claim of the absolute and unchanging truth (cf. Nietzsche, 2007a). Nietzsche warns his fellow philosophers on

this issue as thus stated. Moreover, every philosophy is based on the morality it concedes: values are prior to the production of what we call knowledge. However, although they are illusions, moral judgments can enable us to evaluate the symptoms of the physiology of the one who makes the judgment. Additionally, every philosophy is founded on the morality that it accepts: values come before the creation of what we refer to as knowledge. However, while being illusions, moral judgements can help us assess the physiology of the person making the judgment. This is also a consequence of perspectivism.

Nietzsche believed that Platonism was not only the most destructive philosophy but also an “error” because it claimed to be the only ultimate, unchanging truth (see Nietzsche, 2007a). On this topic, Nietzsche issues the following warning to his fellow philosophers.

From now on, my philosophical colleagues, let us be more wary of the dangerous old conceptual fairy-tale which has set up a ‘pure, will-less, painless, timeless subject of knowledge’, let us be wary of the tentacles of such contradictory concepts of as ‘pure reason’, ‘absolute spirituality’, ‘knowledge as such’: – here we are asked to think an eye which cannot be thought at all, an eye turned in no direction at all, an eye where the active and interpretative powers are to be suppressed, absent, but through which seeing still becomes a seeing-something, so it is an absurdity and non-concept of eye is demanded. There is only a perspectival seeing, only a perspectival ‘knowing’; the more affects we are able to put into words about a thing, the more eyes, various eyes we are able to use for the same thing, the more complete will be our ‘concept’ of the thing, our ‘objectivity’ (Nietzsche, 2017: III, 12).

This passage exemplifies the fundamental features of Nietzsche’s perspectivist ontology. According to perspectivism,

the source of knowledge is not pure; it is “empirical” in the sense that its empirical “affects” (which come about as a result of the interaction between its drives and experiences) give the subject the will to understand, and knowledge is the product of that will. Since affects, sensibilities, and predetermined meanings are the sources of knowledge, an embodied subject’s psyche (i.e., the psychology of a physiological being) and experiences—which must be some processes since experiences are processes in a continual state of becoming—must also be involved. Therefore, a live, corporeal knowing-subject must be involved in the interpretation and creation of “knowledge.” In other words, knowledge would not be possible at all if there were no living beings with the ability to comprehend their environment due to their affects. Therefore, Nietzsche believed that values were “symptoms of the body” and that philosophy was built on these symptoms. As a result, epistemology cannot be isolated from physiology, psychology, and the values formed by them (Nietzsche, 1974: 2).

As a result, just as perspectivism is essential to life, living is also the prerequisite for knowing. According to Nietzsche, “life itself is will to power” (Nietzsche, 2007a: 13), and what we refer to as knowledge is the result of the interpretation that a living thing (when accepted as a whole) does in order to be employed for its self-preservation or for the discharge of that living thing’s strength (cf. Nietzsche, 1968: 643). In order for there to be knowledge, there must be life: the will to power of a center of force who wants to expand and interpret for growth. The understanding of an uninterested (and hence dead) eye, like an omniscient and omnipresent God’s eye, is useless. Nietzsche rejects the notion of the immutable foundation of knowledge and the multiplicity of immutable essences (or unities) of thought (Lingis, 1997: 37). According to Nietzsche, there is no such thing as a “fact in itself,” only interpretations (Nietzsche, 1968: 643), and knowledge must be the result of the forces of an embodied subject’s natural struggle. Nietzsche says that

[t]he will to power interprets (—it is a question of interpretation when an organ is constructed): it defines limits, determines degrees, variations of power. Mere variations of power could not feel themselves to be such: there must be present something that wants to grow and interprets the value of whatever else wants to grow. Equal in that—In fact, interpretation is itself a means of becoming master of something. (The organic process constantly presupposes interpretations.) (Nietzsche, 1968: 643).

This “something that wants to grow and interprets the value of whatever else wants to grow” is the embodied philosopher in the context of philosophy. A philosopher is, in fact, both a person with an embodied body and a live interpreter. Philosophers engage in philosophy as an act of will to power, and the direction of their philosophy is influenced by their guiding perspectives. It is the drives interpret from a micro viewpoint, and they seek to rule over all other drives out of a will to power. And in the case of the philosopher, the philosopher’s drives create values in order to satisfy their will to growth.

Returning to the quotation above, the word “organ” used by Nietzsche to denote the organic origins of interpretation and the physiological thinking present in his ideas might be seen as a heuristic device. This idea holds that the only reason we have eyes is because we need to have them. The same is true of knowledge: We who possess it do so only because of our need. Nietzsche holds that

[t]o what extent even our intellect is a consequence of conditions of existence-: we would not have it if we did not need to have it, and we would not have it as it is if we did not need to have it as it is, if we could live otherwise (Nietzsche, 1968: 498).

Since they both derive from the same source—the will to power—both the organic and discursive interpretations serve the same purposes and are ongoing. Since knowledge is a

means for gaining more power, the will to power is its source. Knowledge is predicated on the preservation of the species, according to Nietzsche, who views the desire for preservation as a byproduct of the will to the growing of power. According to Nietzsche,

[k]nowledge works as a tool of power. Hence it is plain that it increases with every increase of power—

The meaning of “knowledge”: here, as in the case of “good” or “beautiful,” the concept is to be regarded in a strict and narrow anthropocentric and biological sense. In order for a particular species to maintain itself and increase its power, its conception of reality must comprehend enough of the calculable and constant for it to base a scheme of behavior on it. The utility of preservation—not some abstract-theoretical need not to be deceived—stands as the motive behind the development of the organs of knowledge—they develop in such a way that their observations suffice for our preservation. In other words: the measure of the desire for knowledge depends upon the measure to which the will to power grows in a species: a species grasps a certain amount of reality in order to become master of it, in order to press it into service (Nietzsche, 1968: 480).

As a result, we may argue that in Nietzsche’s interpretation of knowledge, there is a “rule of immanence”: whatever is established as a subject of inquiry is only such because of our desire to power (our inner or external power relations). Our “interests” and how we interpret the likelihood that those interests will be realized are what motivate our “will to know.” And the reason our methods of knowledge and discourse (such as our discursive second nature) were able to investigate it is why our desire to power was able to utilize it as a goal. In other words, in the temporal/historical context in which we

become subjects, human beings adopt the methods and techniques of knowing that are understandable to both ourselves and the community. In sum, human beings are discursive by nature, and just like the non-discursive, the discursive arises from the human need for dominance. However, the demands of one specific center of force (a drive, a person, a society, etc.) may differ from those of another—interests can vary—and even within a single center of force, different needs may materialize in various contexts—interests can shift. Accordingly, conflicting knowledge is feasible since it depends on several distinct interests and value-grounds, as well as various views as various manifestations of the will to power.

This picture is the claim that all knowledge claims stem from the same epistemological ground, which is human needs—or in Nietzsche's terms, human will to power. Then, if we accept Nietzsche's perspectivism, we can confidently say that every claim is epistemologically equal since they all come from an empirical and non-epistemological ground which is the realm of the will to power. If every "knowledge" is interpretation, and all interpretation is a specific will to power, what makes one epistemological claim higher than another? This is a question that cannot be answered at first sight, and perspectivism clearly makes every idea on par with each other. However, at this point, a huge problem arises. I would like to call this problem "affirming the demon" and would like to describe it as follows: If every epistemological claim is put on par with each other to a degree that "anything goes," then we must accept demons as valuable as the goods. For example, if we affirm everything to such a degree, astrology becomes as valuable as physics, and the views of violent terrorists become as respectable as those of philosophers. Since this understanding is definitely not one that helps remove or alleviate political problems that are caused by inequalities, I think that this challenge needs to be answered. In my opinion, some views from Foucault's archaeological works will bring us to a possible answer to this challenge.

Foucault's Usage of Perspectivism

In his work *History of Madness*, Foucault's aim is to "draw up the archaeology of [the] silence" of the mad, which results from the death of the dialogue between the modern human being and the mad in the dominance of the discourse of medical psychiatry (Foucault, 2006: xxviii). This is because, with the birth of the "reasonable" human being's abandonment of the mad to the judgment of the doctor, the prior inseparability of reason and unreason evaporated, and an absolute ejection of the mad from society had begun.; and

thereby authorizing no relation other than through the abstract universality of illness and on the other is the man of madness, who only communicates with the other through the intermediary of a reason that is no less abstract, which is order, physical and moral constraint, the anonymous pressure of the group, the demand for conformity (ibid.).

By referring to the psychiatric "monologue by reason about madness" (ibid.), Foucault suggests that the separation of reason and unreason is what gave rise to the unreason, and he conducts a "structural study of the historical ensemble— notions, institutions, juridical and police measures, scientific concepts—" which exercise domination on the mad (ibid.: xxxiii). In other words, with this book, Foucault attempts to expose the historical development and circumstances that led to the term "madness," as we use it now, with its associated medical implications that help to justify the exclusion of the mad from society. To be more exact, Foucault demonstrates in this book how the historical ensemble that rules over the mad subjugates their perspectives.

Another one of Foucault's archaeological works, *The Birth of the Clinic*, as its name suggests, is a historical and critical work that examines the conditions that make modern medical experience possible (Foucault, 2003: xxi-ii). The major argument of the book is that the clinic is "both a new 'carving

up' of things and the principle of their verbalization in a form which we have been accustomed to recognizing as the language of 'positive science'" (ibid.: xx). According to Foucault, the subtle but significant shift in the eighteenth century from "where does it hurt" to "what is the matter with you?" initiates the rethinking of the way the contemporary clinic operates (ibid.: xxi). According to Hubert L. Dreyfus and Paul Rainbow (1982), this work intends "to find the silent structure which sustains practices, discourse, perceptual experience (the [medical] gaze), as well as the knowing subject and its objects." With this study, Foucault "was not seeking atemporal structures," but rather the historical circumstances that would have allowed modern medicine to be practiced as an "experience," as opposed to something that belonged to the category of eternal truth" (Foucault, 2003: 15).

Foucault argued that the history of science and philosophy, at least in France, focused mostly on the noble sciences like mathematics, cosmology, and physics and gave these fields a regularity and continuity akin to an "uninterrupted emergence of truth and pure reason" (Foucault, 2005: ix). On the other hand, in contrast to the "noble sciences" mentioned, the other disciplines that deal with living things, languages, or economic realities were supposed to have an irregular past since they are regarded to be overly rooted in empirical (i.e., historically contingent) reasoning. In *The Order of Things*, Foucault takes a risk by posing the hypothetical question, "what if empirical knowledge, at a given time and in a given culture, did possess a well-defined regularity?" as he puts it in the "Foreword to the English Edition" of the work (ibid.: x) and attempts to define these regularities. According to Foucault, his desire to depict "the genesis of [...] sciences as an epistemological space particular to a period" (ibid.: xi) was the second risk he made in this work. This is due to the fact that he abandoned the conventionally accepted great divisions between disciplines after conducting a comparative and regional study that sought to analyze a specific number

of elements (i.e., the knowledges of living beings, the laws of language, and economic facts) in relation to each other and relate them to “the philosophical discourse that was contemporary with them during a period extending from the seventeenth to the nineteenth century” (ibid.: x). Foucault asserts that he discovered different proximities and isomorphisms by redrawing the boundaries of discourses than what current scholars believed (ibid.). As a result, according to Foucault, he did not function at the same level as a conventional historian of science (ibid.: xi). The conventional historian of science, according to Foucault, operates at the level of the internal economy of knowledges and follows “the progress of discovery, the formulation of problems, and the clash of controversy” to their origins. The scientific consciousness is hence this level’s primary preoccupation. Alternatively, one may focus on the issues that taint the scientific awareness, such as “the influences that affected it [consciousness], the implicit philosophies that were subjacent to it, the unformulated thematics, [...] unseen obstacles” (ibid.). Since the unconscious is believed to reject, obstruct, or upset research, this is about the “negative unconscious” of science (ibid.). In contrast, Foucault conducts his research at the archaeological level in *The Order of Things*, with the intention of revealing “a positive unconscious of knowledge: a level that eludes the consciousness of the scientist and yet is a part of scientific discourse” (ibid.: xi-xii). It is essential to remember that archaeology does not want to undermine the significance of scientific debates. Instead, the archaeological technique seeks to expose the unconscious conventions that shape the ideas, theories, and objects of various discourses (ibid.: xii). It is crucial to keep in mind at this point that Foucault views the phenomena of science as a highly complicated subject that requires examination on a number of levels. He only rejects one particular conception of science, one that accords the autonomous knowing subject with the highest emphasis. Foucault writes:

If there is one approach that I do reject, [...] it is that [...] which gives absolute priority to the observing subject, which attributes a constituent role to an act, which places its own point of view at the origin of all historicity – which, in short, leads to a transcendental consciousness. It seems to me that historical analysis of scientific discourse should, in the last resort, be subject, but rather a theory of discursive practice (ibid.: xv).

The quotation above suggests that Foucault disapproves of the autonomous subject serving as the driving force behind the development of science. The historical analysis cannot be based on a theory of the knowing subject as an objective observer because, in Foucault's perspective, which is opposed to both Christian and modern "truths," the subject is nothing more than a dispersion of perspectives that only appears to be an atomic and autonomous unity within the context of an extra-perspectival truth. Instead, Foucault's archaeological investigations focus on the discourse creation norms that may be deduced from practices—which enable the discourse (its components, including the unconscious and non-discursive ones, including its subject) to exist.

Foucault believes that the discursive must always include non-discursive elements (such as institutions, the state, society, etc.), in addition to the improperness of prioritizing the disinterested autonomous observer as the subject. Because of this, he examines discourses by considering them as "practice," and he situates his research on the level of the positive unconscious of the discursive, which incorporates non-discursive aspects. Foucault asserts that "discourse is something that necessarily extends beyond language" in opposition to the concept that analysis of ideas should be limited to their linguistic components (as cited in Davidson, 2003: xix). According to Davidson, one required level of further analysis must be the level of "strategic intelligibility," in which claims are evaluated in the context of their "functioning" (ibid.: xx). Foucault holds that

[t]he perspectival character of knowledge does not derive from human nature, but always from the polemical and strategic character of knowledge. One can speak of perspectival character of knowledge because there is a battle and knowledge is the effect of this battle (Foucault, 1974: 551; as qt. in Davidson, 2003: xxi).

Thus, it might be argued that recognizing knowledge as a strategic weapon entails treating it as an “effect” in the conflict, which also implies that certain assertions acquire the status of scientific and reliable knowledge while others, the subordinated ones, do not. This is due to the fact that the discursive battlefield that Foucault analyzes is primarily about the struggle to achieve the status of scientificity and, in terms of preservation, the struggle to avoid being subjugated. This conflict is a part of the larger struggle of modern human life as a combination of the discursive and the non-discursive. Therefore, a discourse creates knowledge in an effort to attain the status of science, to strengthen its capacity for persuasion in both discursive and non-discursive contexts, and as a result, to attempt to universalize its norms and perspectives. Foucault dealt with scientific discourses on the levels of their internal rules and the non-discursive roots behind them throughout his academic career because the scientific discourses, with all of their accompanying institutions, as well as their inter- and intra-relations, provide the culmination of the “will to knowledge” as a result of the intellectualized “will to power” of contemporary humans. Furthermore, he accomplished it with a strategic outlook. We may argue that he was, like Nietzsche, engaged in a continuous, shifting, and transformative “battle” for truth—his “other” (or, non-metaphysical) truth—while employing “perspectival strategies.”

Conclusion

If we return to our question concerning perspectivism, the picture will get clearer. I would like to rewrite the following question: “If every “knowledge” is interpretation, and

all interpretation is a specific will to power, what makes one epistemological claim higher than another?" Additionally, I would like to ask the following question too: "How can we attribute value and meaning to epistemological equality under the threat of affirming the demon." In my opinion, Foucault's application of perspectivism which is described in the previous section, gives us the answers to these important questions. According to the perspectivist views of Nietzsche and Foucault, the thing that makes a claim epistemologically higher than another must be the accepted perspectives of the one who interprets. Although it is the case that, from a hypothetical "God's eye", every claim and every perspective is equal to each other. However, in living reality, we philosophize and seek knowledge from our perspectives. For instance, Nietzsche philosophized from the perspective of life, and Foucault from the one of freedom from domination. Hence, Nietzsche, from his viewpoint, prioritized the views that improved life. Likewise, Foucault tried to emphasize the states of domination in the scene of Western modernity and attempted to find some epistemological tools in order to deal with these states. What Foucault told us was the fact that the perspective of what authorities call "abnormal" was subjugated. Since epistemological equality was broken down in one way or another, some members of the society were declared "abnormal" by being categorized as "mad," "homosexual," "delinquent," etc., and this made them excluded from society. The story that Foucault tells us shows that this is done in the name of the extra-perspectival scientific truth. Thus, his views help us to show that perspectivism can be thought of as a ground for epistemological equality. The implications of what Foucault says also answer the question of accepting the demon. Since his perspective was to fight with the states of domination, he was not required to consider the views that are contradictory to this perspective just because they are epistemologically equal. Likewise, if we accept equality as a perspective, we do not need to affirm the demon by prioritizing the only views that improve equalities.

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A Social Justice Perspective on People with Disabilities in Germany

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Introduction

The inclusion of people with disabilities is still a challenge, particularly their participation in the labour market. Worldwide, people with disabilities have fewer opportunities to pursue gainful employment, which is in contrast with Art. 27, “Right to work of people with disabilities”, of the Convention on the Rights of Persons with Disabilities (CRPD) (Committee on the Rights of Persons with Disabilities, 2022). In 2019, the percentage of people with disabilities who were employed across OECD countries was 42 percent (OECD, 2022). Similarly, in Germany, people with disabilities have significantly lower labour market participation compared to those without disabilities. In 2017, the employment rate of people without impairments was 81 percent; while among people with impairments, it was just 53 percent (Bundesministerium für Arbeit und Soziales, 2021). The OECD refers to

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this as the disability employment gap (OECD, 2022). More precise statistics are available in Germany for individuals with an official severe disability. Regarding severely disabled people, for 2021, their employment rate was 50 percent, compared to 79 percent in the general population (Statistik der Bundesagentur für Arbeit, 2023).

Because of this, there are a number of social policy measures to increase the employment rate of people with disabilities. In addition, the German welfare state offers a wide range of benefits and services for people with disabilities. In terms of this, rehabilitation can be a tool for inclusion into the labour market and supporting an equal life. However, in general, rehabilitation is still under-researched and existing studies have rarely included the voices of disabled people themselves (Shakespeare, Cooper, Bezmez and Poland, 2018). Rehabilitation in this regard is “a set of interventions designed to optimize functioning and reduce disability in individuals with health conditions in interaction with their environment” (WHO, 2023). In the German welfare state, rehabilitation is among other areas, divided into medical and occupational rehabilitation, each offering a wide range of support measures. These measures are provided in a highly specialized system with responsibilities shared between different authorities. The result is a complex system of entitlements and competencies with a number of interfaces that is not always transparent, especially for those in need of rehabilitation (Stöbe-Blossey, Brüssig, Drescher and Ruth, 2021).

With regard to people with disabilities who are the target group for rehabilitation, looking at the implementation of social justice as a guiding principle of the German welfare state is an important perspective to highlight possible discrimination and injustice for them. Furthermore, the risk of illness and disability are not equally distributed (Marmot, 2017). Thereby, people with disabilities can also be affected by multiple discrimination, e.g., gender and disability (Kim, Skinner and Parish, 2020) or poverty and disability (Richards and Sang, 2019), which makes an intersectional perspective

necessary (Hill Collins, 2019). What does social justice mean in this regard? There is no universal definition of social justice. Rather, there is a broad discourse about what social justice is. However, some core elements can be identified. On the one hand, we refer to the creation of social justice as a principle of the German welfare state; on the other hand, as an analytical framework, we refer to Miller (1999: 14), who describes social justice as the distribution of advantages and disadvantages between individuals in a society and the institutional structure in which this takes place. Against this background, we look at social justice for people with disabilities in Germany from a legal perspective and present the German rehabilitation system. In more detail, we consider different indicators of access to rehabilitation in order to examine the utilization and non-utilization of rehabilitation services in terms of social justice. The next chapter gives a brief overview of approaches to participatory research in the context of rehabilitation that could help to reach more social justice from the perspective of those affected, but this also requires critical reflection. Finally, this article ends with a conclusion.

Social Justice for People with Disabilities in Germany from a Legal Perspective

The German Constitution describes the German state as a social state (Art. 20 I and Art. 28 I). From this, the establishment of social justice and social security can be derived as basic principles of the German state. The German Federal Constitutional Court interprets the principle of the social state as an obligation of the state to ensure a balance between social differences and a fair social order (Bäcker, Naegle and Bispinck, 2020: 35). In the implementation of social justice in the design of the social state and its systems, the sub-dimensions of equality of opportunity, equity in performance, equity in needs and intergenerational equity can be identified (Becker and Hauser, 2009). The Constitution also guarantees a catalogue of Fundamental Rights that can be claimed. Amongst others, the German Constitution protects the human dignity

(Art. 1), the freedom of occupation (Art. 12), the freedom of action (Art. 2), and the legal recourse guarantee (Art. 19 IV) of people. Furthermore, it forbids in particular discrimination because of disability (Art. 3 IV). Different domestic and international frameworks complement these constitutional requirements.

In 2009, the German Parliament ratified the Convention⁴ on the Rights of Persons with Disabilities (CRPD). Its objective is to promote, protect and ensure the full and equal enjoyment of all human rights and fundamental freedoms by all persons with disabilities and to promote respect for their inherent dignity (cp. Art. 1 CRPD). For this, States Parties undertake to ensure and promote the full realization of all human rights and fundamental freedoms for all persons with disabilities without discrimination of any kind on the basis of disability, e.g., by means of legislative, administrative, and other measures (Art. 4, par. 1 lit. a CRPD). The right of persons with disabilities to the enjoyment of the highest attainable standard of health without discrimination on the basis of disability ensures access to health services that are gender-sensitive, including health-related rehabilitation (Art. 25, par. 1 CRPD). The wording indicates a broad understanding of rehabilitation that goes beyond medical rehabilitation (Welti, 2022: 1046). This includes health services needed by persons with disabilities specifically because of their disabilities, including early identification and intervention as appropriate, and services designed to minimize and prevent further disabilities (cp. Art. 26, par. 3 lit. b CRPD). The right to work on an equal basis with others describes the right to the opportunity to gain a living by work freely chosen or accepted in a labour market and work environment that is open, inclusive, and accessible to persons with disabilities (Art. 27, par. 1 CRPD). This right also comprehends the promotion of occupational and professional rehabilitation, job retention, and return-to-work

⁴ Adopted on 13 December 2006 by sixty-first session of the General Assembly by resolution A/RES/61/106.

programmes for persons with disabilities (Art. 27, par. 1 lit. k CRPD).

According to the CRPD, rehabilitation services and programmes, particularly in the areas of health, employment, education, and social services, shall

- begin at the earliest possible stage and are based on the multidisciplinary assessment of individual needs and strengths;
- support participation and inclusion in the community and all aspects of society (Art. 26, par. 1 lit. a, b CRPD).

Related to rehabilitation, also the availability, knowledge, and use of assistive devices and technologies designed for persons with disabilities are required (Art. 26, par. 3 CRPD).

After the ratification of CRPD the German legislator is developing further legal provisions on all levels. Leading goals are the protection of human dignity, safeguarding the right to self-determination as well as strengthening individuals' ability to participate in customs/conventions of the community.

According to Federal Participation Act (*Bundesteilhabe-gesetz*) people with disabilities or people threatened by disabilities receive benefits under Social Code No 9 (SGB IX) in order to promote their self-determination and their full, effective, and equal participation in life in society, to avoid disadvantages or to counteract them, cp. Section (Sec.)1, Sec. 4 par. 1 SGB IX. The benefits include, for example, advice, cp. Sections (Ss.) 32 SGB IX), benefits for medical rehabilitation (Ss 42 SGB XI), benefits for participation in working life (Ss 49 SGB IX), maintenance benefits (Ss 64 SGB IX), benefits for participation in education (Sec. 75 SGB IX) and social participation (Ss. 76 SGB IX).

In this regard, people with (imminent) disabilities have a special right to make wishes and choices because their legitimate wishes should be met when deciding on the benefits and when carrying out the benefits for participation (Sec. 8 par. 1 SGB IX). Benefits in kind can be provided as cash benefits under certain conditions upon application (Sec. 8 par 2

SGB IX). Benefits, services, and facilities should also give the beneficiaries as much scope as possible to take responsibility for shaping their living conditions and promoting their self-determination (Sec 8 par. 3 SGB IX). On the one hand, there are also limits to this right of self-determination: For the legitimacy of a wish within the meaning of Sec. 8 Par. 1 SGB IX, it depends on the individual case and on the fact that the wish does not conflict with the task of the rehabilitation agency and the objectives of the legislator (Fuchs 2021, Sec. 8 SGB IX). On the other hand, the right to be able to carry out the benefits to which they are entitled – in deviation from the principle of benefits in kind – through a personal budget on their own responsibility as if from a single source, is expressly intended to promote self-determination (Sec. 29 SGB IX).

With the far-reaching reform of the guardianship and care law of May 4, 2021 (Federal Law Gazette I p. 882), the legislature has revised essential parts of family law in the Civil Code (BGB) with effect from January 1, 2023. The central goal of the reform is to strengthen the self-determination and autonomy of the person being cared for (cf. Braun 2020, p. 201; Grziwotz 2020, p. 248). In the future, the guardianship court can appoint a legal guardian if an adult is unable to take care of his or her affairs in whole or in part legally due to an illness or disability (cf. Sec. 1814 par. 1 BGB from 2023). Legal assistance is an “appropriate measure” within the meaning of Art. 12 par. 3 CRPD, which gives people with disabilities access to the support they may need in exercising their legal capacity.

The goal of improving the self-determination of older people has also found its way into specific federal state regulations. For example, all measures in the North Rhine-Westphalia Elderly and Care Act (APG NRW, Art. 1 of the law of October 2, 2014, GV. NRW. S. 625) are to be geared towards the self-determination of older people and people in need of care in every phase of life secure (Sec. 1 par. 2 APG, cf. also Sec. 7 par. 1 APG). The purpose of the NRW Housing and Participation Act (WTG, Art. 2 of the Act of October 2, 2014, GV. NRW. p. 625) is, among other things, to ensure that older people or

people in need of care and people with disabilities can lead a self-determined life (cf. Sec. 1 par. 1, Sec. 1 par. 4 No. 1, Sec. 3 par. 1, Sec. 4 par. 13, Sec. 5 par. 2, Sec. 8 par. 2 No. 4, Sec. 12 par. 1, § 24 Sec. 2 No. 2e WTG).

With the introduction of the supplementary independent participation counseling (EUTB) in § 32 SGB IX on January 1st, 2018, the legislator expressly aimed to strengthen the position of people with disabilities and people at risk of disability vis-à-vis service providers and service providers, the so-called empowerment idea (cf. Federal Law Gazette 18/9522, p. 3). The beneficiaries should be able to exercise their personal responsibility and self-determination more than before by means of the free, supplementary advice and support offer (Jabben 2020, par. 2). The EUTB serves as a tool for independent advice and clarification before applying for specific services, free of economic or budgetary interests and cost responsibility (Federal Law Gazette 18/9522, p. 245). In addition, the EUTB achieves the goal specified in Art. 26 UN CRPD of supporting people with disabilities through so-called “peer counseling”, which the legislator has implemented by advising those affected for those affected (Federal Law Gazette 18/9522, p. 246).

The System of Rehabilitation in Germany

Rehabilitation supports people with existing disabilities or those at risk for a disability. The aim is to strengthen physical, mental, social, and vocational abilities as well as self-determination and equal participation in all areas of life. It includes medical, therapeutic, nursing, social, vocational, educational or technical services, including adaptation of the person's environment. Rehabilitation is a planned, multi-professional, and interdisciplinary process oriented towards individual participation goals. It respects the right to self-determination (DVfR).

Nevertheless, the German rehabilitation system is – from the beginning – largely segmented due to its different carriers and service providers. Public rehabilitation carriers can

be, among others, the statutory work accident insurance, the carrier of the statutory pension insurance, the Federal Employment Agency or the regional provider of social assistance. Private service providers for education or training measures are manifold as well. Different professional systems with varied operational logics need to collaborate in the implementation of rehabilitation practices. In addition to this, in Germany as worldwide, the “rehabilitation workforce is made up of different health workers, including but not limited to physiotherapists, occupational therapists, speech and language therapists and audiologists, orthotists and prosthetists, clinical psychologists, physical medicine and rehabilitation doctors, and rehabilitation nurses. Many other health workers, such as general practitioners, surgeons, and community health workers, may also play an important role in a person’s rehabilitation.” (WHO 2023). The result is a complex system of entitlements and responsibilities that are not always transparent for those entitled to have such benefits. Accordingly, the German legislator established different public information and advice obligations in the Social Code, such as Sec. 14 Social Code No 1, Sec. 11 Social Code No. 12, Sec. 106 Social Code No. 9. Additionally, supplementary independent participation counselling (EUTB) was founded (see above). Furthermore, specific procedural rules shall protect people’s rights, e.g., the obligation of rehabilitation carriers to immediately check its own responsibility in between 14 days (cp. Sec. 14 par. 1 Social Code No 9), the obligation to decide applications in between 3 weeks (cp. Sec. 14 par. 2 Social Code No 9) and, reimbursement of self-procured services (Sec. 18 par. 3 Social Code No 9) which means that a requested service is deemed to have been approved after a certain deadline of two months after application has expired.

In the following, we focus on the areas of medical and occupational rehabilitation in the German welfare state.

Health-related, medical, rehabilitation has a broad objective in Germany as it shall, among others:

- prevent, eliminate, and reduce disabilities, including chronic diseases,
- avoid, overcome, reduce, or prevent limitations in earning capacity and the need for care,
- to prevent them from getting worse and
- to prevent the early receipt of current social benefits or to reduce current social benefits (cf. § 42 section 1 SGB IX).

It comprehends, for example, treatment by doctors and members of other health professions, remedies including physical, speech and occupational therapy, tools, psychotherapy as medical and psychotherapeutic treatment, stress testing, and occupational therapy.

Occupational rehabilitation has a more specific objective as it aims to maintain, improve or (re)establish the earning capacity of people with illnesses, disabilities or people at risk of disability according to their ability and to ensure their participation in working life as long as possible (cf. §§ 9, 16 SGB VI in conjunction with §§ 1, 4, 49 et seq. SGB IX). Through them, the pension insurance institutions (among others) implement the social right of participation of people with (threatening) disabilities, the promotion of their self-determination, and equal participation in life in society through employment (§ 10 No. 2, § 29 Para. 1 No. 2 SGB I, § 1 sentence 1, § 4 paragraph 1 number 2, §§ 49ff. SGB IX). This corresponds to the international understanding of rehabilitation (cf. Art. 26 UN CRPD).

The benefits of participation in working life include, in particular

- assistance in maintaining or obtaining a job, including activation and professional integration services,
- professional preparation, including basic training required because of the disability,
- the individual qualification within the framework of supported employment,
- professional adjustment and further training,
- vocational training,

- the promotion of self-employment by the rehabilitation provider and
- other assistance to promote participation in working life, to enable and maintain people with disabilities appropriate and suitable employment or self-employment.

Both health-related and occupational rehabilitation services also include specific medical, psychological, and pedagogical assistance. Services are, in particular

- Help to support in coping with illness and disability,
- Help to activate self-help potential,
- informing and advising partners and relatives as well as superiors and colleagues, if the beneficiaries agree,
- arranging contacts with local self-help and counselling facilities,
- Help for mental stabilization and the promotion of social skills, including through training social and communication skills and dealing with crisis situations,
- the training of practical life skills,
- the training of motor skills, and,
- the guidance and motivation for claiming benefits for participation in working life.

Thus, the German welfare state offers a wide range of benefits and services for people with disabilities in the areas of medical and occupational rehabilitation.

Findings on Access, Utilization and Non-Utilization of Rehabilitation Services in Germany

In principle, rehabilitation services should be accessible to all people who have a disability or are at risk of disability. The access to rehabilitation in Germany is organized via different social security agencies. Their responsibility results from the different prerequisites of the applicants. To examine access to rehabilitation services from a social justice perspective, we look at several indicators to examine accessibility and utilization of rehabilitation in Germany.

In terms of utilization, there is a gender balance in the use of medical rehabilitation services (Deck, Erbstößer and Zollmann, 2022), whereas women are less likely than men to attend occupational rehabilitation (Nivorozhkin, Reims, Zollmann and Bethge, 2018). The reasons cited for this are a lack of compatibility with caring tasks, which are still more relevant for women (Nivorozhkin, Reims, Zollmann and Bethge, 2018) as well as insufficient financial security during occupational rehabilitation, which depends on previous income from employment (Sellach, Bieritz-Harder, Haag and Spangenberg 2006). Persons with low social status applied more frequently for medical rehabilitation services, in particular due to poorer subjective health. However, there are no systematic hints of socially unequal access or utilization of medical rehabilitation services (Fach et al., 2021). Further research results indicate that access to occupational rehabilitation services is more difficult for the long-term unemployed who rely on social assistance (Brussig and Schulz, 2018), which could be related to anticipated chances of success with regard to labor market integration but also to information deficits. In addition, a recent study shows that extensive and expensive full training programs are more likely to be taken up by younger male rehabilitants with higher educational qualifications and who were integrated into the labor market before the rehabilitation (Kölle et al., 2022). With regard to further diversity characteristics, empirical studies partly indicate that people with a migrant background respectively foreign citizenship are less likely to use rehabilitation services. As possible barriers, a qualitative study identifies insufficient German language skills, lack of information about rehabilitative services, and lower health literacy. Communication problems and misunderstandings can thereby also arise on the part of the care providers. (Brzoska, Yilmaz-Aslan, Aksakal, Kübra and Razum, 2022).

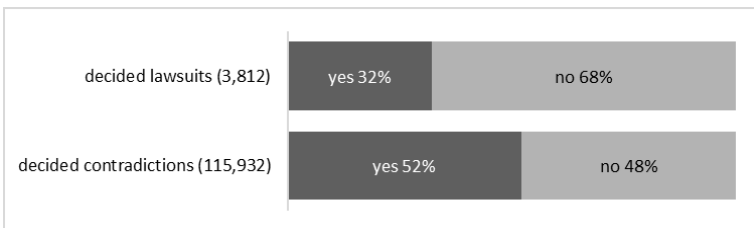
A qualitative study that focuses on the participants' perspective describes also information deficits. For example, young people with psychological disabilities describe that

their path to occupational rehabilitation was partly detoured (Tophoven, Reims and Tisch, 2019). Older participants who already have work experience describe that the possibility of training or retraining within the framework of a rehabilitation process was found through targeted searches or information from third parties. However, the knowledge about the possibility of occupational rehabilitation must still be translated into actual participation. Thereby, some people fight for the approval of a certain measure within the framework of occupational rehabilitation or rehabilitation in general (Tisch et al., 2017).

Thus, knowledge about rehabilitation and access to rehabilitation appears more difficult for some groups. Until now, research often focuses on individual diversity characteristics. However, this does not account for the possible intersectionality of diversity categories. Rehabilitation services must do more justice to the diversity of needs and expectations (Brzoska, Yilmaz-Aslan, Aksakal, Kübra and Razum, 2022).

In addition, from a more institutional perspective, data on objections and lawsuits regarding rehabilitation procedures can be used. In this report, on the one hand, the number of appeals and lawsuits is reported, but also how successful they are, i.e., where people had to be proven right and possible procedural errors occurred. The report looks at proceedings in which individuals have contested administrative or judicial decisions regarding their rehabilitation.

Figure 1: Decided contradictions and lawsuits in 2021 from the rehabilitants' perspective



For 2021, there is information on 115,973 decided contradictions and 3,812 decided lawsuits. Thus, first of all, there is a high number of contradictions and lawsuits. In terms of the decisions, 52 percent of the contradictions and 32 percent of the lawsuits were successful from the perspective of the rehabilitants (Bundesarbeitsgemeinschaft für Rehabilitation e. V. (BAR), 2022) (cf. Figure 1). This reporting is an important tool to encourage people to claim their rights, which is also likely to succeed and gives hints for administrations to improve their work.

Social Work in the Rehabilitation System

Social work is an integral part of the rehabilitation process of people with disabilities (Knoop and Anton 2022). Social justice is thereby an important orientation and ethical basis for social work (e.g., Watts and Hodgsons 2019). In addition, the points of contact between rehabilitation inclusion and the goals of social work as a human rights profession are manifold. On the one hand, social work can be engaged in social policy planning and implementation from the central to the local level – in order to improve social services and social justice for people with disabilities. On the other hand, social justice can be realized on a small scale through individual advice, empowerment, and networking – which is also highly valuable. In line with this, the client's right to self-determination must never be impaired by improper influence or pressure. Instead, social workers have the task of acting and advising in a client-centred and human rights-oriented manner. This includes informing the client about all relevant circumstances, including existing alternatives so that they can really weigh the pros and cons on a sufficient basis of assessment and make an independent or self-determined decision. This is a major challenge, as it requires legal knowledge and knowledge of the actual offers. Thus, in terms of rehabilitation, social work is also one jigsaw piece to more social justice. In addition to support in the rehabilitation process, it should also be possible to provide support for access to rehabilitation

services. Another aspect is to ensure good aftercare. Overall, Social Workers have a diverse and broader mandate compared to other health workers in the rehabilitation process, such as physiotherapists, occupational therapists or clinical psychologists. This is, at the same time, a huge chance and a challenge.

Participatory Research on Rehabilitation in Germany

In the German-speaking world, participatory rehabilitation research has been increasingly addressed for almost ten years (Farin-Glattacker, Schlöffel and Schöpf, 2020). The term “participatory research” refers to research approaches that aim to understand and influence social reality in a partnership-based manner. Participatory research is a style of research in which the people who are being studied are involved as partners. Due to the orientation towards the bio-psycho-social model (consideration of person- and environment-related contextual factors) and the special importance of patient orientation and cooperation, rehabilitation research is particularly suitable for the participatory involvement of those affected (Farin-Glattacker, Schlöffel and Schöpf, 2020).

Different forms of participation of affected persons can be distinguished, which differ in the degree of participation, e.g., low participation in the form of consultative participation to high participation in the form of steering the project, where the initiative is taken by the affected persons themselves (Farin-Glattacker, Kirschning, Meyer and Buschmann-Steinhage, 2014: 6). In the different phases of a research process (determination of research needs, project planning and application, review and funding decision, project execution, publication, and implementation), the degree of participation can vary and be reasonably adjusted, considering the objectives and design of a study (Farin-Glattacker, Schlöffel and Schöpf, 2020: 82).

Participatory research appears as a critique of the hierarchical relations of knowledge production, with the claim to dissolve the subject-object relationship through partnership-based participation of those affected in the research process, thereby contributing to a democratization of research (Flick, 2022: 75). Especially in research fields (e.g., rehabilitation) where more conventional forms of academic research reach their limits, and certain groups are considered “difficult to reach” the advantages of participatory research outweigh the disadvantages, as accessibility is a question of perspective, social proximity and address (von Unger, 2014: 97). Through the partnership-based participation of those affected, participatory rehabilitation research can thus help improve social services for people with disabilities and realize their human rights, human dignity, and self-determination.

Critical consideration should be given, however, to whether participatory research enables those affected to take ownership of the research process or whether the offer of participation remains a mere alibi or pseudo-participation (von Unger, 2014: 97).

Conclusion

Social justice for people with disabilities requires manifold efforts. Legislative bodies – from the central to the local level – have to improve existing laws in order to realize human rights, human dignity, and self-determination of people. This is an ongoing and not a unique process in the German social protection system. This is – at the same time – a huge challenge and a conflict of goals because the German legislator also requires the economical provision of social services.

As indicated in this article, the legal provisions related to rehabilitation as well as social justice for people with disabilities in Germany are complex and diverse. The reason for this is that the rule of law and primacy of law have a long tradition. Nevertheless, certain challenges remain as many people with disabilities do not know their rights as well as rehabilitation carriers’ obligations. In terms of the implementation

of the law, specific instruments and provisions were put in place in order to support people's rights in the fragmented social protection system with its varied operational logics. Rules for collaboration were implemented, procedural rules to protect clients' rights, and specific instruments for legal aid and legal advice, such as peer counselling. Despite this, the implementation of the law is still a challenge. It seems that not all rehabilitation carriers implement procedural law or needs assessment legally proper. Better advice/legal aid for people with disabilities or stricter supervision by supervisory authorities could help in this regard. New developments such as the EUTB as well as quicker verifications of responsibilities and the processing of applications, are heading in the right direction. Social work as profession involved in the rehabilitation process can be strengthened. In comparison to other health workers in the rehabilitation process, such as physiotherapists, occupational therapists or clinical psychologists (cp. WHO 2023), Social Workers have a diverse and broader mandate. This may lead to better acknowledgment of human rights and self-determination of people as, among others, empowerment, individual advice and networking are professional tasks of social workers.

Furthermore, the social security system in Germany is mainly organized through social insurances. However, we know that some people in Germany are not included in the social insurance system. This is evident, for example, for immigrants, persons without permanent residence, or self-employed persons who are not subject to compulsory insurance. But also, employees who do not fulfil certain requirements, such as pre-insurance periods in the compulsory insurance schemes, cannot claim social insurance benefits. They have to apply for integration assistance against the regional carrier of social assistance. In case of (threatening) disabilities, there is a strong right to advice and support (e.g., according to § 106 SGB IX). But benefits differ partially from the social security benefits, such as the certain budget for work, which is limited. However, it is difficult to make more precise statements about

these groups. Further research is needed here. Further empirical interdisciplinary rehabilitation research and further strengthening of new approaches as participatory research are essential in order to support evidence-based policy design, improve social services for people with disabilities and realize their human rights, human dignity, and self-determination. But there are still many knowledge gaps.

Also, because of ongoing demographic change and a shortage of skilled workers, rehabilitation will get even more into the focus of social security institutions, researchers, and policy makers in the coming years. Most likely, employees and self-employed will have to work longer in the future. Decisive for employment up to the standard retirement age - or beyond - is that health as well as participation risks are reduced. Health and participation risks are not equally distributed. A strong social gradient in health is well known (WHO, 2013). Vulnerable groups need appropriate support in this regard and must not be excluded. Investing in rehabilitation is not only a question of social justice and social responsibility - it is also an important economic imperative.

In line with this, digitization harbours opportunities for rehabilitation, e.g., by means of digital learning applications or applications for health promotion, prevention, and medical apps. Since 2020, the latter have been part of the service catalogue of the statutory health insurance in Germany, and since 2021, they have also been part of the rehabilitation catalogue. Digital tools can effectively support the rehabilitation process also in terms of bureaucracy. However, in the population, large differences in access and competencies with regard to digitality can be observed. A new challenge is apparent here with regard to the participation and support of people with disabilities.

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| Author Biographies

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M. Onur Arun is an assistant professor in the Department of Social Work at Anadolu University. He earned his Ph.D. from the School of Social Sciences at the University of Manchester before joining Anadolu University. His educational background also includes studies at Istanbul University, Middle East Technical University, Ludwig Maximilian Universität München, and Humboldt Universität zu Berlin. Currently, he also lectures in the Düsseldorf University of Applied Sciences in Germany. His primary research interests draw on the expansive literature of political philosophy and sociology as well as critical social policy with a particular focus on the normative frameworks of theories concerning distributive justice, (un)deserved inequalities, the social and economic background of privilege, dimensions of poverty, and various forms of (dis)advantage. Recently, he has begun to concentrate on the formation of morally unjustifiable privileges and (un)fair distribution of rewards in liberal meritocratic arrangements, with a focus on the unequal costs of achieving the good life for (dis)advantaged social classes, gender identities, and ethnicities. Arun is a recipient of the Social Policy Prize (2011), an award bestowed by the leading academic figures

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Jonathan Leif Basilio obtained his Ph.D. in Sociology from the University of Manchester and is an assistant professor in the Department of Sociology at California State University, Bakersfield. His research interests and teaching encompass social theory, immigration, Asian American studies, religion, and the sociology of morality. His publications and projects have explored the practical applications of contemporary social theories of morality, pre-marital decision-making within the context of regularization, and the tax morale of irregular migrants. One of his current research projects examines the legal consciousness and practices of virtue-crafting among irregular migrants. He is also working on a dynamic intersectional framework, which he begins to explore in the introductory chapter of this volume, that seeks to understand how various social categorizations interact across diverse and specific contexts.

Benjamin Kerst

Benjamin Kerst is currently acting as a lecturer and researcher in the Department of Social and Cultural Sciences at the Hochschule Düsseldorf University of Applied Sciences and a member of the Research Focus on Right-Wing Extremism and Neo-Nazism. As a graduate of the Department of Philosophy and the Department of Sociology of the University of Konstanz, he holds two master's degrees in Philosophy and Sociology. He was a member of the German research team in a major international project supported by the European Commission entitled Dialogue About Radicalisation and Equality between 2018 and 2021. During the project and his empirical field research in the German marksmen's club milieu, he also examined the relationship between inequality and perception of injustice as well as radicalization. Since 2014, he has been actively researching and writing on issues associated with

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Alem Kebede

Alem Kebede received his education from Oklahoma State University in Stillwater, Oklahoma, USA. His degree includes MA in philosophy and a Ph.D. in sociology. After graduation, he worked at the University of Tennessee in Knoxville (UT). After a short stint at UT, he joined California State University, Bakersfield (CSUB), where he served as a social theorist for over two decades. Alem Kebede has taught a variety of courses at CSUB. His classes range from critical thinking to advanced graduate courses in classical and contemporary social theories and social psychology. His expertise includes social psychology, focusing on social movements and political sociology. Alem Kebede's research interests are wide-ranging and diverse. He is interested in social theory, which he believes is essential for understanding the complexities of human behaviour and societal dynamics in various domains of contemporary social life. His research also focuses on social psychology, specifically the study of social movements' origin and development and their impact on society. Additionally, Alem's work delves into political sociology, examining the rise and fall of authoritarian orders. Currently, Alem Kebede is involved in multiple research projects on re-civilizing processes, civil war, and the dynamics of authoritarian regimes. His research has been published in numerous academic journals,

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Kent E. Henderson

Kent E. Henderson, Ph.D., is an environmental sociologist at California State University, Bakersfield. His research has focused primarily on global environmental inequalities examining issues related to international development, deforestation, climate change, and other forms of air pollution. He has published in peer-reviewed academic journals, including *Sociology of Development*, *Environmental Sociology*, and *Journal of World-Systems Research*. His current research focuses on the incorporation of social and environmental justice issues into the United Nations' development agenda.

Alejandro Marambio-Tapia

Alejandro Marambio-Tapia is an assistant professor in the School of Sociology at the Catholic University of Maule in Chile. He gained his first master's degree in Public Communication and later received another master's degree in Sociology, both at the University of Chile. Afterward, he completed his Ph.D. at the University of Manchester, School of Social Sciences - Department of Sociology. He is currently an associated researcher at the Centre for Urban and Territorial Studies (CEUT) and the Centre for Social Conflict and Cohesion Studies (COES), where he conducted postdoctoral research about the politics of debt in the post-industrial working class in Chile. His research focuses on the fields of economic sociology, the sociology of consumption, and social stratification. Adopting a cultural economy perspective and drawing on qualitative and quantitative data, he has researched the normalisation of debt and the making of credit markets in precarious consumer societies, such as Latin America, and explored how indebtedness can shape moralities, subjectivities, consumption practices, and social class identities. He is currently leading a project (Fondecyt 11200893) that sheds light on practices of critical consumption such as veganism,

consumer cooperatives, and debtor rebellion at multiple scales and how they deal with the state and the markets. The main goal of the project is to address how critical consumption practices can escalate from an individual to a collective realm in order to become social, innovative, and transformative experiences.

Wai Lau

Wai Lau is a researcher of sociology at the University of Manchester and the managing editor of *Figurations* at the Norbert Elias Foundation. He received his Ph.D. in Sociology from the University of Manchester, MA in Sociology from the University of Manchester, and BA (Hons) in Sociology from the Manchester Metropolitan University and University College Dublin. Primarily, his research interests involve employing the works of Norbert Elias to chart complex individual and structural developments found in Chinese, Japanese, and Korean societies. Currently, his research focuses on examining and understanding the different aspects of civilising processes in Japanese society. Furthermore, he is an associate fellow of the Higher Education Academy and a member of the British Sociological Association, the British Association for Chinese Studies, the British Association for Japanese Studies, and the Norbert Elias Foundation. He is the author of *On the Process of Civilisation in Japan: Sociogenetic and Psychogenetic Investigations* (2022), published by Palgrave Macmillan.

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Deborah Giustini holds a Ph.D. in Sociology from the University of Manchester. She is Assistant Professor at HBKU and Research Fellow at KU Leuven. Her research uses practice theory and ethnography to study expertise, power, inequalities, and tech-induced tensions in knowledge-intensive workplaces. She is currently investigating the dynamics of multilingual communication and intercultural cooperation in organizational settings. She is on the editorial boards of *Interpreting and Society*, *Sociology*, *Sociological Research Online*,

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Ibrahim Kuran

Ibrahim Kuran is a full-time lecturer in Political Economy in the Department of Economics at Istanbul Medeniyet University. After receiving his B.A. degree in Economics from Sabancı University, Kuran gained his M.A. degree in 2010 from the Ataturk Institute of Modern Turkish History at Boğaziçi University, where he studied the interactions between memory, space, and identity politics through the practice of renaming places in Turkey. Kuran holds two Ph.D. degrees; the first is from the Political Science and International Relations from Boğaziçi University (2020), and the other is from the Department of Economics at Istanbul Medeniyet University (2022). He received Sabancı Bank Plc-London Scholarship between 2006 and 2008 and TUBITAK Scholarship for master's and doctoral studies between 2008 and 2016. Currently, Kuran has two distinctive research agendas: on the one hand, he explores the class dynamics behind the Kurdish voting in Istanbul; and on the other hand, he investigates the political economy of universal basic income (UBI). In his most recent project, Kuran empirically investigates public support towards the UBI through original datasets retrieved from global social media platforms. As a mixed-method researcher, Kuran uses historical/archival research, ethnography, regression analysis (STATA), data-mining, and text-mining (R) in his projects. His articles and op-eds appeared in *Toplum ve Bilim*, *Birikim*, *Radikal*, and *Bianet*.

Abdullah Said Arı

Abdullah Said Arı is a research assistant at Istanbul Medeniyet University, Department of Political Science and Public Administration. He received his B.A. degree in Political Science

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Necdet Yıldız

Necdet Yıldız is an assistant professor in the Department of Philosophy at Anadolu University. He obtained his Ph.D. degree in Philosophy from the Middle East Technical University with a dissertation entitled Nietzsche and Foucault on the Relation between Knowledge and Power. Following his Ph.D., he joined the Anadolu University, where he currently teaches on epistemology, political philosophy, and logic. His primary field of expertise is on post-Kantian philosophy with a particular focus on Nietzsche and Foucault; yet, he is also interested in the broad topics of contemporary philosophy, philosophy in cinema, and philosophy as a way of life.

Matthias Meißner

Matthias Meißner holds a degree of Dr. Jur. and has been employed as a full-time faculty professor of law, with a specialisation in social protection laws, by the Faculty of Social Sciences and Cultural Studies at the University of Applied Sciences in Düsseldorf since 2017. Meißner's doctorate in social security law was completed at the University of Jena on the

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Julia Seefeld

Julia Seefeld is working as a research assistant in the project “Tasks and benefits of social work in vocational rehabilitation” at the University of Applied Sciences Düsseldorf since 2021. She is currently a Ph.D. candidate at Düsseldorf University of Applied Sciences and the University of Duisburg-Essen on the topic of gender-specific benefits and utilization of social work services in vocational rehabilitation. Between 2013 to 2021, she studied social sciences at the University of Cologne, where she received her Bc.S. degree, and sociology at the University of Duisburg-Essen, where she completed her M.A. degree.

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Silke Tophoven holds a Ph.D. and has been employed as a full-time faculty professor of social policy by the Faculty of Social Sciences and Cultural Studies at the University of Applied Sciences in Duesseldorf, Germany. Tophoven completed her Ph.D. studies at the University of Bremen on the subject of the employment histories and health of older female employees in 2018. Together with Matthias Meißner, she heads

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