

Presentation

Inequalities, stratification and social justice

Since the emergence of Sociology, the question of inequalities has been the center of attention in this discipline, having been consolidated afterwards as one of its greatest thematic axes. Extensive and relevant national and international academic production has been available for decades, dealing with issues such as social classes, income inequality, socio-occupational mobility, educational inequality, social hierarchies, race and gender inequality, etc. (cf. Silva and Hasenbalg, 2003; Hout and DiPrete, 2006).

In recent years, other issues have been embodied in these studies, seeking new angles through which inequalities can be investigated, and also reflecting the transformations that society has undergone. In this sense, works that examine stratification having as basis the sphere of consumption and the attitudes, identities and symbolic borders between social groups earned greater attention (Devine and Savage, 2005; Bennett et al., 2009; Bourdieu, 2008; Lamont, 1992). Therefore, this is one of the most traditional and dynamic fields of study — in terms of production of empirical research — in Social Sciences.

The debate on this subject has gathered even greater momentum now, at the beginning of this century. If, on one hand, a tendency has been detected towards an increase of inequalities in many developed countries, on the other hand, it can be noticed that a significant portion of the populations in emerging countries, such as Brazil, has enjoyed positive inclusion experiences by means of credit and consumption. Increase of income, eradication of extreme poverty, creation of formal jobs, and expansion of education have established higher levels of living conditions. However, elements that are essential for the promotion of social justice and equity have not been achieved yet, and the gains in income and consumption not always represented inclusion in a broader sense.¹

¹ Expectations and frustrations experienced during the pathway-construction process are a relevant matter to any analysis of social justice and equality.

Such factors have aroused great interest in this issue, which has even attracted non-specialist attention, as people became curious to understand the mechanisms through which inequalities persist, their consequences, and how they can be addressed.

Therefore, understanding recent changes, as well as aspects of permanence, in relation to inequalities and social stratification became one of the greatest challenges of Sociology in this century, so that the comprehension of obstacles to the construction of a fairer society is still one of the main tasks of this discipline. For these reasons, we believe that the texts gathered in this dossier of *Civitas — Revista de Ciências Sociais* can contribute for some public and academic debate about the subject. Its primary goal is to show the multiple faces of social inequalities, their complexity and dynamism, and how the theme of inequalities has achieved over time new dimensions that transcend studies focused exclusively on income or that are restricted to stratification.

The article by Mercedes Krause — *The temporality of money: a mechanism of sociocultural reproduction of social inequalities* —, for instance, by carrying out a comparative analysis of household economics of middle class families and working class families living in the metropolitan region of Buenos Aires, makes the limitations of studies focused exclusively on the volume of income clear. Its qualitative analysis shows that the reproduction of inequalities is also due to the different ways those classes use money, according to their orientation regarding the present and the future.²

Thus, the articles gathered in this dossier address changes and aspects of permanence regarding the multiple dimensions of social inequalities and stratification, as seen in recent years in Brazil and also other countries, such as Argentina, China, United States and South Africa.

The deep transformations that took place in contemporary societies led to significant changes in sociological analyses in general, particularly in the field of Stratification and Inequalities. Even if factors such as class, gender, race, income, education, among others, are acknowledged as still necessary for research projects in this field of knowledge, there is nowadays consensus that they are no longer sufficient. In order to understand the persistence of inequalities, despite modern egalitarian values, it is crucial to question how society builds and creates justifications for those, as well as their effects and feasible means to fight them. Thus, in addition to the classic elements

² Due to size limitation, some articles of the dossier mentioned herein may be available only in the digital version thereof.

appearing in studies on inequalities and stratification — which we call “the usual suspects” —, sociological analyses have adopted myriads of new perspectives, broadening the scope of their investigations. In this context, there is the emergence of studies on perceptions, values and notions of social justice; studies on not only economic elites, but also political, cultural and intellectual ones; research on health, generations, space and urbanism; economic and development policies; effects and consequences of inequalities in terms of criminality, violence and interpersonal confidence, just to mention a few.

For decades studies conducted in Brazil have contributed to the description of the mechanisms that make the distribution of material or symbolic goods unequal. The subject is far from being exhausted, given its importance for the understanding of the structure of classes and social relations; however, we know very little about the view that Brazilians have of inequalities and the link they create between equality and justice.

As sociologists, we know that inequality is not a natural fact, but rather a social construction. It depends on circumstances, and is largely a result of political choices made throughout the history of every society. Hence the importance of international comparisons for analyses in this field of study, especially at a time of geopolitical and geoeconomic reconfigurations. It is necessary to understand the phenomenon of inequalities as a result of the interaction between “realities” and “perceptions”, acknowledging that those two dimensions are not distinct between each other. And analyses embracing those two perspectives can provide a clearer view of the contingencies and agencies involved in the processes of production, reproduction and — why not — overcoming of inequalities.

One of our goals, by preparing this dossier, is to encourage reflection on the concepts of equality and justice, emphasizing that they are not coincident, even if they are articulated — especially in sociological analyses in the field of stratification and inequalities.

The article *(In)Equality and (In)Justice*, by Guillermina Jasso, deals exactly with the intricate relation, or inexistence thereof, between inequalities and justice evaluation. According to the author,

Understanding the exact connection between inequality and justice is important because justice is classically regarded as the first line of defense against self-interest and inequality. Absent a strong and clear link between inequality and justice, the sense of justice would not awaken to exert its moral suasion, no matter how great the inequality or how fast its increase.

In her article, the author reaches the conclusion that there is no general or necessary connection between economic inequality and justice evaluation, so that the effects of the former over the latter may be nonexistent, or even occur contrarily to what would have been expected.

The concept of equality, however, has been commonly used as a synonym for the concept of social justice. In spite of, in contemporary societies, the idea of justice being intrinsically linked to the fight against inequalities, we wish to draw attention to the fact that these two concepts not only do not match, but also, in several contexts, may mean exactly the opposite. Equality may be, in certain circumstances, extremely unfair. We know that such affirmation is very controversial and provocative, but in light of the works by John Rawls (2009) or Amartya Sen (2001), it is entirely understandable.

We, sociologists, have the occupational defect of searching for the comprehension of concepts in reality. That is why we wish to make a reference to Amartya Sen, who exemplified the fair inequality or the unfair equality through questions such as the situation of disabled people. In this specific case, treating in the same way agents who have competitive conditions so disparate and disadvantageous would be unjust. Likewise, it may be unfair when agents have the same opportunities, but make different investments and, even so, obtain the same result.

We know that it is difficult to do this logical exercise in a country like Brazil, which stands so far from the ideal equality of opportunity. However, the contexts cannot constrain the concepts. It should be remembered that in the name of social justice, many focused policies, which offer unequal conditions or rewards to different social groups, have been required and implemented. Those policies are acknowledged as fair because by promoting unequal conditions in the process or result, they correct socially recognized inequalities already at the beginning. By introducing compensatory policies, in a certain way society acknowledges its own failure in guaranteeing justice for all equally.

In this sense, currently one of the major innovations in the fight against inequalities in Brazil is the adoption of racial quotas (in addition to also taking into account socioeconomic criteria) in the selection of many public universities. Thus, the aim is trying to remedy the historical — and still alarming — disadvantages of the black population in relation to whites in the country. Both the articles by Jerônimo Muniz — *Inconsistencies and consequences of the race variable for the measurement of inequalities* — and Jordão Horta Nunes and Neville Julio de Vilasboas e Santos — *Inequality on*

the top: black and white employers in Brazilian job market —, included in this dossier, look at this important dimension of inequalities. Whereas the latter finds and analyzes the disadvantages of blacks among employers, the former addresses the possible barriers to the formulation of public policies aimed at fighting racial inequalities in Brazil, such as racial quotas, due to so-called difficulties in defining the target population.

It is also important to consider that the concept of inequality is unlikely to be understood in the singular, given the multiplicity and plurality of the phenomenon which it refers to.

The countless dimensions in which inequalities exist are made evident in an article written by Zhu Di — *Homeownership of the young middle class: the case of elite university graduates*. She analyzes the relation between the socioeconomic level of the original family and the feasibility of young Chinese students becoming homeowners, and demonstrates that young homeowners, in turn, have more positive indicators of quality of life. Therefore, her research presents key elements in the stratification analysis that are interconnected and reinforce each other mutually, such as social origin, property, quality of life, sociospatial segmentation, among others, all having substantial impact on the odds of life.

For this reason, the question (“Equality of what?”) that was chosen for the title of the first chapter of Amartya Sen’s book *Inequality reexamined: equality of what?* is so important. Sen wishes to draw attention to the fact that inequalities are multifaceted and based on two types of diversity: human heterogeneity and the plurality of dimensions according to which equality can be defined. In such context, equality in one dimension can mean — and usually does mean — inequality in another. Thus, equality should be analyzed in tandem with other issues.

Besides his concern with the promotion of social justice, Sen emphasizes the importance of developing individual liberties. Often regarded as opposite concepts in Philosophy, equality and freedom are, according to the author, linked. And how? Only with the expansion of individual liberties individuals can make their choices and widen their opportunities — be they social, political or economic ones. Suppression of freedom, from this point of view, limits opportunities and choices — and, consequently, the possibilities of agency.

Sen also points the complexity of the concept of inequality when he stretches the notion of privation to, besides income, the lack of power, participation and voice, exposure to fear and violence, access to communication, vulnerability — in short, the exclusion of basic and welfare

rights. Inequality is not exactly a concept that can be used unisonally, for it has multiple dimensions, is multifaceted and, perhaps, exactly because of its varied and comprehensive character, is stable and resistant. And by affirming that inequality is not a unison concept, we wish to state that it is not a univocal concept either. It is actually very far from that, because it allows — and, indeed, should do so — multiple interpretations. Thus, we have before us the tension between the equality of human condition (therefore an essentially illuminist perspective) and the inequality that is present in the diversity — or heterogeneity — of individuals. And therein we can include choice and agency (crucial factors of individual liberties) as elements of heterogeneity.

It is under this seemingly irreconcilable tension that studies on inequalities have developed, and also started to orient the debate on social justice in Brazil and worldwide.

That false dilemma, however, has been long overcome by Sociology. We are aware that all societies experience some sort of inequality in various dimensions, such as prestige, power, income, among many others, and that the origins of such inequalities are as diverse as their manifestations. Thus, by not adopting a society fully egalitarian as a model, studies about inequalities and stratification focus on the opportunities or — as more properly defined in this field — the odds of life.

What matters here is to know how great inequality is, the criteria of stratification, and the extent of distances in the opportunities to reach positions in the social structure. In this regard, the studies in this field concentrate on several elements that may constitute barriers to egalitarian competition for positions. Luiz Flávio Neubert, Arnaldo Mont'Alvão and Fernando Tavares' article *Social stratification and time use: studying individuals in the labor market*, for instance, addresses an issue that has increasingly gained more room among researchers investigating stratification and inequalities: the use of time. Based on empirical research carried out in Belo Horizonte, the authors examine how individuals from different social strata organize and use their time, aiming at understanding how the *use of time* may be related to the process of production and reproduction of social inequalities.

By relinquishing the myth of a society with identical rewards, this approach moves towards the idea that societies should be fluid — and the more egalitarian the odds of life are, the more fluid the societies will be. Simultaneously to that, it aims at evaluating the distance between social positions. In a society with a high degree of fluidity, the social distances tend

to decrease — it should be noted that those distances concern income, job prestige or status, education, access to certain goods, etc. In the end, fluid societies tend to be more homogeneous.

In a way, there is a victory of John Rawls' theory in the idea of social fluidity. Under the veil of ignorance, we would all tend to enter into a fairer social pact, in which disparities between individuals would be smaller and the whole would be more homogeneous. Fluidity can be our “veil of ignorance”. If we imagined a system in which changes of social positions were more frequent, the chances of achieving them more egalitarian, and the barriers between them easier to cross, an “agreement” or a “social contract” based on the principles of justice — provided that justice is understood as equality of opportunities — would be far easier to be reached. If an individual does not know which position he or she is fit for, this person will tend to negotiate towards some fairer and more egalitarian distribution. If this individual is aware that the fluidity in his/her society is high and, therefore, that his/her chances of reaching positions are as realistic as those of anybody else, he or she will be more open to accept egalitarian conditions for all.

Thus, both the focus on institutions, as per Rawls, and the focus on individual and social behavior, or the life that people are capable of leading according to what they value, as defended by Sen, are relevant.

Analyses of inequalities and social justice implicate the consideration of not only the conditioning factors of choices and opportunities, but also the possibilities for facing them, especially in social contexts in which life conditions are characterized by deep and long-lasting disparities.

Fighting inequalities depends mostly on political will, and in this case the issue of representation is vital. Clara Araújo's article *Values and gender inequality: mediations between political participation and democratic representation*, also included in this dossier, deals not only with the genre dimension of inequalities, but also with its impact on female representation in politics. The less expressive presence of women in these environments is not only the result, but also (and chiefly) the reason for the enormous inequality of genre that exists in our society. On that account, the article aims at understanding some of the mechanisms that may explain the relation between those two phenomena.

As mentioned earlier, by acknowledging that all societies are unequal, studies about stratification and inequalities focus on two factors that are pivotal, even if they are not the only ones, to assess the fairness or unfairness of the stratification system: (1) the levels or “size” of disparities, both in the odds

of life and rewards (income, for instance), and the perception of individuals about it; (2) the criteria or the determining factors of stratification, that is, the criteria for the allocation of individuals in social positions, which may or may not be seen as legitimate and fair.

Those two dimensions can indicate how fair or unfair a society is, as well as the level of tolerance regarding the prevailing inequalities. The idea of a close relation between democracy and reduction of tolerance concerning inequalities prevails in political culture, but the simple adoption of a representative democracy system and a discourse in line with individual liberties can be a necessary — but not sufficient — condition for the promotion of justice (understood as equality of opportunities).

Based on this notion, the case of South Africa is emblematic and interesting, being presented in this dossier, quite critically, in the article by Jayanathan Govender titled *Social justice in South Africa*. Despite the end of the *apartheid* regime, and against more optimistic expectations, his analysis shows that inequality and poverty remain extremely high. The author points that the ensuing social costs are huge and undermine the possibilities of virtuous social and economic development. The situation described and analyzed by Jayanathan Govender then brings to mind the fact that situations of huge inequality may still persist after a country adopts a democratic regime and has its constitutions grounded on the commitment to social justice.

In the case of Brazil, studies on the perception of inequalities (Scalon, 2004) show that the belief that prevails is the one saying that distribution of opportunities and resources is based on meritocratic stratification criteria, such as effort, education, qualification or intelligence. This may lead to a tendency of legitimization of the stratification system. As a consequence, such view would justify higher tolerance towards reward inequality and acceptance of more elastic limits to it, given the perception that resources would be distributed according to meritocratic criteria.

However, equality of opportunities, which is ultimately the key element for a fair society, by adopting the Rawlsian concept of justice (Rawls, 1993), can only be achieved through public actions that add and combine different strategies. In this sense, the articulation between universal public policies and focal policies is indispensable — and even if they are distinct in nature and are applied in different situations, they are neither mutually exclusive nor conflicting. It is perfectly possible to understand them as complementary strategies, because the multidimensional nature of inequalities requires the combination and articulation of both. After all, if some public policies are

acknowledged as rights — and we could use basic education, health and social security as examples —, they should be necessarily universal. As we know, rights should be extended to all, without exception.

Thereby, the development model adopted in some contemporary societies — and Brazil is no exception, being focused on the generation of credit and the consumption of individual goods, without the respective improvement and investment in universal public policies — is not a definitive answer and is not efficient to fight inequalities either. The limitations of this strategy can be observed in several countries around the world, with many of those suffering from economic decay.

Sônia Guimarães' article *Economic development and institutions in Brazil* deals exactly with the disadvantages and risks of some industrial policy and institutional architecture that has led to the construction of a limited-access order — opposite to an open-access order —, undermining the possibilities of socially inclusive and economically sustainable development. The article discusses the role of the state and the market before a new development paradigm, based on innovation, technological advancement and knowledge. In this sense, projections for Brazil are still, unfortunately, rather bleak.

Lastly, we should remember that inequalities are also a subject of concern not only in reason of ethical and moral values, but also because their objective consequences frequently affect society as a whole. That is the case of violence, quite often used as an example of negative effect of inequalities, which would affect, to a greater or lesser extent, all members of a society.

Nevertheless, Eduardo Ribeiro and Ignacio Cano's article *Lethal victimization and inequalities in Brazil: evidence at a municipal level* shows that the relation between inequalities and violence is more complex and sensitive to the unit of analysis chosen than it could be initially imagined. By means of an in-depth empirical analysis, the data assessed show that the income of the poorest (a partial consequence of inequalities) — and not the inequality of income itself — is directly related to the incidence of lethal violence.

Even so, the issue of lethal victimization is a nodal point in the debate about justice. After all, is there a more important right than the right to life? If the chances of staying alive are unequally distributed, according to income, generation, race or any other characteristic, we are standing before a society that exposes the most dramatic and cruel face of the absence of justice, thereby understood in addition to its legal dimension.

The group of articles included in this edition of *Civitas — Revista de Ciências Sociais* therefore aims at presenting various angles of what is called social inequalities, their causes and consequences, as well as introducing a brief debate on the sensitive relation between equality and justice. This is a very broad and comprehensive subject, which, obviously, cannot be exhausted in one single publication. Our goal was to incorporate various topics of Sociology, such as genre, violence, poverty, development, innovation, opportunities, heritage, race, class, political participation, use of time, among others, exposing their connections with the primary issue of the dossier, namely social justice. We hope to have minimally achieved this goal. Enjoy!

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