GLOBAL DIALOGUE

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Talking Sociology with Zhao Tingyang

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> Editorial

Welcome to the first issue of 2024 of *Global Dialogue*! If last year was an experimentation period involving a steep learning curve, we are now glad to already have some new features prepared for this year. In each issue, we will feature new projects, partnerships, and innovative communication and dissemination strategies, while keeping the very essence and vocation of this magazine, that is, the commitment to public and global sociology.

In the interview that opens this issue Sari Hanafi, former president of the ISA until 2023, offers us a fascinating conversation with Zhao Tingyang. Here this prominent Chinese intellectual reflects on some of his main theoretical contributions and shares his current interpretation of the crisis of liberal democracy.

The next section, organised by Federico Neiburg, Isabelle Guérin, and Susana Narotzky addresses the 'cost of living', thus pointing to one of today's most dramatic issues: the rise in the price of basic goods and the unbearable cost of living for most people. It does so from an original viewpoint, treating the cost of living as a polysemic practical category, far beyond a numerical index. Delving into different realities in Latin America, Africa, and Europe, eight articles contribute both to the conceptual debate on the subject and to the empirical discussion of diverse issues, including how different actors (families, experts, and policymakers) face the crisis. This thematic section is the result of a partnership between *Global Dialogue* and *International Sociology*. With this initiative which will be continued in future issues, we aim to make available to a wider audience some of the main results of a recently published Special Issue of *International Sociology*.

The following section inaugurates another new partnership. The 'Open Movements' project, published since 2015 by the leading independent media platform Open Democracy as an initiative of the ISA Research Committee on Social Classes and Social Movements (RC47), is now integrated into *Global Dialogue* as a new section. Its mission is to understand the main transformations in our societies based on social conflicts and movements. Our interest goes both to the more visible transformations, those that are featured in newspaper headlines, and to less visible ones, which are fundamental to understanding cultural and social change. Open Movements aims to promote an open space for a global public sociology of social change that circulates within and beyond the ISA. As founders of the project, current ISA president Geoffrey Pleyers and myself explain in an introductory article the perspective of Open Movements, what we have done in recent years, and what we intend to do from now on. The following article discusses the importance of engaged research, the place of the South in global dialogues and the much-needed support for new researchers (Cox, Arribas Lozano, and Chattopadhyay). Another piece engages with the role of audio-visual projects within communities and their implications in terms of narratives and decentralisation of knowledge (Flores). A final piece elaborates on the current genocide against the Palestinian people, discussing the conflict in context, which is central to moving beyond simplistic views on the issue (Grinberg).

This issue's theoretical article discusses a process of historical transformation of the state. Paolo Gerbaudo, a leading public intellectual, offers a complex and fresh look at what he calls the "strange return" of the interventionist state, analysing contradictions and trends in this process. Finally, the Open Section includes three articles discussing the authoritarian dimension of meritocracy (Maciel), the low diversity in multilateral organisations and challenges to turn the situation around (Gonzalez), and an under-analysed type of colonialism that Mark Munsterhjelm defines as 'forensic colonialism'. The latter is forged by influential scientists from the US, Europe, and China, who have used indigenous peoples as resources and targets of new technologies such as ancestry, inference, and phenotyping.

I hope you enjoy the whole set of contributions, and I would like to remind you that we are open to receive your contributions. Follow us on social media @isagdmag and help us spread *Global Dialogue* in your language. ∎

Breno Bringel, editor of *Global Dialogue*

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> **Submissions should be sent to:** globaldialogue@isa-sociology.org.

ISA International Sociological Association

GLOBAL DIALOGUE

> Editorial Board

Zhao Tingyang talks with Sari Hanafi about what he calls Tianxia system, an alternative concept of the political.

The *"cost of living"*, a polysemic practical category simultaneously used by specialists and in people's daily lives, covers different realities around the world.

The new thematic section *"Open Movements"* aims to open a space for the analysis of social movements and their challenges in different countries.

Cover picture: Wirestock, Freepik.

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> In This Issue

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> "*Alternatives still exist but are often made invisible,
especially in the absence of public protests*"

Breno Bringel and Geoffrey Pleyers

> Tianxia System and Smart Democracy
An Interview with Zhao Tingyang

Credit: Personal archive of Zhao Tingyang.

Zhao Tingyang is a distinguished Chinese philosopher and leading intellectual who graduated from Renmin University and the Chinese Academy of Social Sciences (CASS). He is an Academician Fellow and Distinguished Professor at CASS Institute of Philosophy and has also held posts at several other Chinese and foreign institutions, including Zhejiang Normal University, the Berggruen Institute and the Institut International TRANSCULTURA. His numerous publications in Chinese, English and other languages include his book *All under Heaven: The Tianxia System for a Possible World Order* (2021, University of California Press) and his co-edited book *Transcultural Dictionary of Misunderstandings: European and Chinese Horizons* (2022, Cent mille milliards). He was interviewed in August 2023 by **Sari Hanafi**, a Professor of Sociology at the American University of Beirut, Lebanon, and past president of the International Sociological Association.

Sari Hanafi (SH): Prof. Zhao, I had the pleasure of reading your last book, All under Heaven: The Tianxia System for a Possible World Order, *in which you are critical of the current multiplication of political conflicts worldwide and the current nation-statist logic of international relations. You propose instead the idea of Tianxia, a Chinese word that means 'all under heaven', being interdependent, and ensuring the primacy of the world over nation-states. How would you summarize Tianxia in a few words?*

Zhao Tingyang (ZT): Let me say my imagination of the Tianxia system of the world envisions a better possible world with the concept of "compatibility", more popularly translated as "harmony". I think compatibility is a better translation, in a similar way as Leibniz explains the "best of all possible worlds" made by God with the concept of the "compossibility" of the richest collection of beings. Interestingly, his ontology is really close to the ontology of *I Ching*, the Chinese bible, which emphasizes the "compatibility" of all beings. A conceptual Tianxia system of "all under heaven" should envision an all-inclusive world of "no outside" with "great harmony" of all peoples or "compatibility" of all civilizations. It is an open question why China began its politics with a concept of a systematic world like *Tianxia* while Greece had a state as *polis*: the two most significant starting points of politics.

More than a world system, Tianxia suggests an alternative concept of the political, as a methodology or the art of *changing hostility into hospitality*, instead of Carl Schmitt's recognition of the enemy, Marxists' class struggle, Morgenthau's struggle for power, or Huntington's clash of civilizations. The reason is simple: if politics cannot stop or at least reduce hostility, it is no politics at all, nothing more than war of a kind. And war proves the failure of politics rather than being the *continuation of politics*, as Carl Von Clausewitz thinks. If we want fights, why the political?

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More reasonable and practical than the traditional one, my renewed conception of Tianxia claims three *constitutional* concepts: (1) *internalization of the world*, a shared universal system inclusive of all nations, so making a world with no more negative externalities; (2) *relational rationality*, which emphasizes the priority of *mutual minimization of hostility* above maximization of exclusive interest; and (3) *Confucian improvement*, which is non-exclusive improvement for everyone, better than Pareto's improvement, and defined by *one improves if-and-only-if all others improve*. Confucian improvement means *everyone* gets Pareto's improvement if anyone gets it. Hopefully, a new Tianxia will solve global problems such as technological risks, global financial problems, climate change, pandemics and clashes of civilizations.

Consistent with the Tianxia system, global ethics should be based upon an improved "Golden Rule" that is more coherent than Christianity or Confucianism. The traditional Golden Rule says: "*Never do to others what you would not like others to do to you*." This is nearly perfect except for its unilateral subjectivity, which problematically implies that the "I" has the one-sided authority to decide the universal concepts of what is good or right. I would rewrite the Golden Rule as "*Never do to **others** what others would not like you to do to them*". By changing subjectivity into trans-subjectivity this new rule becomes strictly reciprocal and symmetric, thus genuinely universal.

A new Tianxia system should also be realized in the epistemological sphere. It envisions a concept of a new encyclopedia, inspired by the French project of encyclopedia in the eighteenth century, and now likely to be supported by the Internet and AI. This involves a concept of knowledge rather than a physical book and is intended to include all knowledge from all civilizations with equal respect and reciprocal recognition. The new encyclopedia will develop upon and from research on universal concerns, or the problems facing all humans, or the "emergences" of interactions, as understood in holism or methodologies of complexity instead of the traditional disciplined taxonomy and reductionist view of knowledge, and in place of the one-sided agenda by Western knowledge, such that it becomes a "metaverse library" for all people.

SH: How do you assess China today in terms of the Tianxia paradigm? In one of your interviews, you said that Communism defeated and excluded its Western competitors in China but also devalued the Chinese culture. The existence of China matters more than its identity; in other words, the fact of being is more important than what something looks like. Can you elaborate on this idea with concrete examples?

ZT: Tianxia is a concept for the whole world. It awaits a possible future in its own time. However, it has interestingly been applied to China, to see it as a "world-pattern

state", smaller than the entire world and therefore far from the best of its conceptual potential; so, I am not sure if China could be considered a Tianxia paradigm. Nevertheless, it can be seen as an example. The "world-patterned China" is of great importance in its invention of the regime of "one country, many systems", started during the Han Dynasty (202 BCE–220 BCE), under the principle of the priority of compatibility, or harmony if you will, successfully reducing conflict among various cultures or religions. This is part of the living heritage in modern China.

It should not be a big surprise that modern-day China devalues traditional aspects of China because contemporary China has been so eager to become modern. Modernization has been considered a matter of survival for a nation under pressure from the rest of the world. Chinese thinking always follows the principle "Survive all changes" or "Live through change". This is neither religious faith nor an ethical value; but an "ontological" methodology of existence can nonetheless be found. Of course, China has its cultural or traditional identities to maintain, which are less influential than its mere existence when at a critical point of survival, or its *kairos* to become better. China is in the "doing" rather than merely "being", and its methodology matters more than its conceptualization. China loves to improvise since it recognized *I Ching*, the Book of Changes, as its methodological "bible" in its earliest days. We have here a methodology searching for the optimal chance to survive, exist, persist, and grow strong if possible. Confucianism, as the stereotypical image of China, is less robust than is usually thought. It has experienced its ups and downs throughout history and is contingent on its historicity. I am hesitant to say China remains a Confucian society now. But I am sure the Chinese methodology of "being with changes" remains strong, living longer than any specific value, doctrine, or "ism".

For instance, this idea can explain the confusing spectacle of "Chinese religions". From a monotheist perspective, China is a country of no religion. From an anthropological perspective, it is a place of all faiths, or pantheism of a kind; or polytheism as it appears. Specifically, in folk societies and most areas (except the Muslim area), people do not hate the gods of others. On the contrary, most people would rather accept the stories of other gods as well as their own, and even believe in them or at least respect them. So many people have a long list of gods, usually from Buddhism, Taoism, Christianity, along with many local gods. For intellectuals who do not take religions seriously, there is instead a variety of "isms", the left or the right, the progressive or the conservative. I do not see much faith or loyalty in their choices; most of them will turn to the one which works better.

SH: You have thoroughly diagnosed the crisis of the liberal democracy system and how powerful forces that control capital and the media are subverting democracy, a sort of "Trojan horse" that has destroyed

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Credit: Personal archive of Zhao Tingyang.

democracy in such a way that the threat to democracy comes from within itself. Can you elaborate?

ZT: A weak point of democracy is its ambiguous conceptualization: never exclusively defined and thus open to interpretations. This vague physiognomy allows everything to disguise itself as democracy and thereby claim its justification; and so, many democratic "Trojan horses" arise. And the worst thing is that it is hard to tell them from true democracy, due to their similarity in appearance and practice. It is not certain that there is a true democracy, for we have never seen the ideal concept or an *eidos* of democracy, even though we know democracy has its own specific origin and genes. Now, the worst of all: pseudo-democracy is found to be a true twin of democracy, with the same gene. The *agora*, where democracy was developed, was also a market. A market of opinions is close to a market of commodities; if more people choose apples, then clearly apples are more welcome.

Similarly, if more voters support Trump, then Trump seems justified. Many will not recognize this, but it is awkward due to the lack of a robust democratic reasoning. Market and democracy share the same basic rules. Unfortunately, the majority principle does not always speak truth or goodness; and more unfortunately, there are many ways and opportunities for the political, financial, and media powers to mislead and manipulate people's choices. Powers are smart; they know the best strategies. In the modern condition of the rule of law as well as under the rule of the market, more powers develop the strategy of reshaping or remaking the public's mind by selling illusions to the people and thereby creating one common mind. So, we see "publicracy" rather than democracy; or publicracy in the appearance of democracy; or distorted democracy overlaid upon publicracy. That is the "Trojan horse" that undermines democracy.

It is not strange that democracy fails to protect itself from publicracy, because democracy could not recognize the Trojan horse of publicracy: democracy and publicracy look too much alike. The problem is that the existing democracy is unintelligent, whereas the powers underlying publicracy are much smarter. Democracy is a practical way to make public choices, and it has no mind of itself, so it cannot defend itself against outside powers. Fundamentally, democracy does not define what is good or justify what is right; it has never even justified itself. Democracy persists because there is no better alternative. In other words, democracy is a way to decide on the distribution of rights and power, but not the definition of goodness, truth, or justice. Therefore, democracy needs its own mind.

SH: Do you envision any alternative?

ZT: My expectation is for a "smart democracy", a knowledge-based democracy, hopefully, to become as smart as the powers that try to control it, at least better than the aggregation of misled public opinion.

Let me explain. The smart democracy consists of a "two-vote system" and "two-level elections". Two votes mean

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"one person, two votes", the pro and the con, for any election, representing one's like and dislike. This "dislike" is an indispensable variable, it even matters more than the "like", so the "two votes" form a complete representation of one's mind, better than the prevalent system of "one person, one vote". The basic rules for the two-vote system are as follows: (1) *the net pros rule*. That is, net pros = pros − cons. Suppose that A gets 51% pros and 31% cons, then 51% − 31% = 20% net pros; B receives 41% pros and 11% cons, so 41% − 11% = 30% net pros. B should be considered the winner; (2) *the conditional majority rule*. If A and B coincide in their net pros, the one with more pros wins.

The two-level election means two steps to finish the voting. Firstly, everyone votes for what they want. Secondly, the scientific committee casts the knowledge weighted votes to approve or disapprove people's choices. So, the two-level election defines the separated powers: people decide what is desirable, and the scientific committee decides what is feasible. If designed this way, democracy could be made *institutionally* intelligent so that it is smart in itself and, by itself: free from irrational choices. In short, it will be a knowledge-based democracy. My effort is limited to improving the voting system for now. A smart democracy certainly needs more intelligence and smarter conceptions. This is a task to be pursued further.

SH: You call for "knowledge-based democracy", but who nominates the experts who will be part of commissions or committees? It looks as if "experts" were only providing scientific solutions, but they are often divided along political lines.

ZT: Nomination is always a problem. I am afraid there is no perfect solution. Politics based upon parties is necessarily partisan. The practically feasible way we have might not be the best, but the ideal does not exist, so we have to come to terms with reality. This is why I should confine my imagination to acceptable improvements rather than radical reformation of democracy. But, how will we nominate the experts for the scientific committees to run smart democracy? My idea adopts the traditional "reputation", referring to well-recognized candidates. One's reputation is an obvious social fact. For instance, those who are the leading scientists, who have won significant prizes and therefore supposedly know more about the potentiality or risk of what people want to do. Of course, reputation might be misplaced, but knowledge is certainly better than ignorance. The experts will have their political inclinations, and the best thing we scould expect is that they would be honest. There are ways to cut off secret financial links.

My theory of smart democracy, as you see, is a modest combination model of mixed "political genes": about 50% from modern democracy, 30% from Jizi's optimal decision for public affairs, and 20% from the Plato's "philosopher king". I try to balance the wiser traditions of dealing with the public and common affairs. It is about what is more reasonable, still far from ideal.

SH: In reading your work, it seems that your bleak criticism of the democratic system cannot explain why we have social movements today. The democratic system is not a closed one; even with its "Trojan horse", it is capable of producing (ecological, socioeconomic and political) alternatives.

ZT: I fully agree with you that democracy is not a closed concept. Alternatives to institutional democracy, social movements, could be regarded as spontaneous democracy, though supported or curated by some organizations. They are not the "Trojan horses"; I respect them. I guess you would say that social movements are the better side of democracy. To be sure, social movements are closer to direct democracy. This is good. Still, a practical problem in my view is that the pursuit of social movements could also be misled with an unreasonable passion, so that asking for more than a state or the world could afford is occasionally destructive rather than constructive. It reminds me of an old saying: "A housewife knows the expenses of running a family". I would instead insist on a democracy based upon rational knowledge and institutionally arranged to be smarter by itself. The "cool democracy" is more prudent and reliable than the hotter variety. My question for you is: If we want changes in our societies, how do we know which changes are better for a society?

In most cases, democracy might be blind to what is good. It is funny, or not so funny, that our philosophers still have no clear concept of what "good" is. Democracy itself is not a value today. It is, instead, a matter to be valued.

SH: You question democracy as a value; but what constitutes the value is the qualifier of democracy. This is why we talk today about liberal democracy. I grew up in Syria where the Baath leading party uses "popular" to qualify democracy. When you associate liberalism with democracy, it means freedom of religion, speech, press, and assembly, establishing associations and political parties, and accepting the Universal Declaration of Human Rights in an abstract (and not concrete) way. Should we criticize these values? In "popular" democracy in Syria, there was barely any freedom of expression or the possibility of establishing associations and political parties unless you accepted the ideology of the ruling elites. In addition, the voting system for parliament was complex, with special seats reserved for the working class and peasants, which, for me, is a good thing even if these two categories are not free to organize themselves. Thus, the word "popular" is full of anti-liberal values, but seeks some sense of social justice. This is why we cannot discuss democracy without its quali-

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fier. You use the qualifier "smart" for democracy to move from its current "opinion-based" form to a new "knowledge-based" form. However, how does smart-ness position itself vis-à-vis the two (popular and liberal) traditions?

ZT: Thanks for your sharp inquiry; it hits home. Before discussing how "smart" democracy could be, I would say there is no pure democracy, making true democracy a problematic concept. You are right: a democracy is related to some values when it is connected to a qualifier. This indicates that democracy itself, the very concept, is nothing more than a tool or procedure and that we will not agree on a democracy committed to values that are not our own. Therefore, qualifiers matter more than democracy, for qualifiers reveal the more profound problems and the conflicts. The highfalutin voice of democracy may conceal the de facto pursuit of specific values, interests, and power.

Your concept of a qualifier is illuminating; it reminds me of the critical problem of ranking values. Everyone has their ranking of values; otherwise, they are trapped in a dilemma of trying to do everything. The ranking of values suggests discrimination and, therefore, conflicts everywhere. Discrimination is a scary word, but it refers to the fact that everyone is discriminating, even though most people would rather take a stand against any discrimination. A qualifier or a partial label of democracy, liberal or popular, individual freedom or social justice, is unlikely to reduce conflicts or disagreements and may even increase social entropy or social fragmentations. So I would rely on something other than the claimed values, no matter how appealing they are. I would instead turn to developing the "settings of intelligence" in the operating system of democracy, in expectation of an intelligence-embedded democracy – what I call "smart democracy" – in which the systematic arrangement will let knowledge take power to make the final decision. In a visionary sense, super AI may help in the future, working as the add-on to human minds or even working together with human minds and finally creating AI-human trans-subjectivity, hopefully smarter and less ideological. Democracy is meant to make public choices in service of a whole society rather than in service of competing political powers.

SH: One last question, which may be of great interest to our readers. Recently, you co-edited the Euro-Chinese Dictionary of Cultural Misunderstandings *with European scholars. This idea is terrific because you are outside the postcolonial paradigm where you must look at different (Southern) epistemes but work with your European colleagues to overcome misunderstanding. This is like the Sino-Franco research groups calling for post-Western sociology and working together.*

ZT: We need to develop a new and better episteme rather than indulge in the antagonist competition of the traditional ones. I do not take the postcolonial view as a way out of colonialism, or more specifically, orientalism. Our minds will be limited, trapped and misled by colonialist concepts and patterns when we try a postcolonial way of talking back or "unsaying" what has been said of us: the orientalist picture imposed on "us" by colonialists. I mean that if I talk back against colonialism, my mind's architecture will be constructed by colonial concepts, it will be set in colonial discourses and my words will not speak my own mind. Or, if you say, "I am not as you think", your scope and sight have been involuntarily confined by the colonialist or orientalist horizons, losing your freedom of mind. The antagonism of epistemes is dull and negative. I would instead restart with the primary and general problems facing all humans, and we may share and exchange different concepts, better arguments, or interesting mutual misunderstandings; all of us may benefit. I call this "transcultural multiplication" – an initial metaphor before I could find a better one.

It is natural for anyone to misunderstand others; the other mind always has a reason to misunderstand us. We may reduce mutual misunderstandings by clarifying basic concepts, seeing if our or their theories and the presuppositions underlying our or their concepts are consistent or not. ■

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> Cost of Living:
Expert Concepts and Everyday Efforts

by **Federico Neiburg**, Federal University of Rio de Janeiro, Brazil, **Isabelle Guérin**, Institut de Recherche pour le Développement, France, and **Susana Narotzky**, Universidad de Barcelona, Spain

Credit: Vitória Gonzalez, 2024.

This thematic section is the result of a partnership between *Global Dialogue* and *International Sociology*. In it, we aim to make available to a wider audience some of the main results of a special issue that has just been published in *International Sociology*. In this article, we introduce the concept of *cost of living*, which is simultaneously a category fabricated and utilized in the universe of specialists and a vernacular concept that traverses people's daily lives, in reference to a myriad of efforts and experiences in times of crisis. We propose a multi-scale, historical and comparative perspective that allows observation and analysis of the dilemmas produced in contemporaneity by polycrises. These include the combined effects of increase in the prices of basic items, such as food and energy, the precarization of labor markets, and the accelerated decrease in wages following the COVID-19 pandemic on a global scale. These multiple dimensions of crises have affected the ways through which individuals and families seek lives worth living. We also draw attention to the moral and political dimensions of the rising cost of living and to the conflicts and struggles that are taking place in the world of experts, in public spaces, and in people's daily lives.

> ### The context

The combined effects of the COVID-19 pandemic, the climate crisis, and the war in Eastern Europe have made

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the rising cost of living, inflation, and hunger central issues in public debates and in the daily lives of people. Many must deal with the diminishing purchasing power of money, and shortages produced by disruptions in the supply chains of products considered essential to life, such as food, water, and energy. An unprecedented cycle of rising prices has unfolded on a planetary scale. This is affecting not only the poorest and the so-called middle classes in the countries of the Global South, but also those in the rich countries of Europe and North America. The UN Food and Agriculture Organization (FAO) global food price index reached in March 2022 its highest level in 60 years, while the historical series of the International Monetary Fund indicated the greatest increases in food and energy prices in 100 years. The rising prices of basic consumer items are a key dimension of the present polycrises, as are the lack of employment or its precarious nature, the diminishing real value of wages, massive migrations, and an environmental emergency.

> ## The concept

'Cost of living' is a polysemic practical category. It is this polysemy that we attempt to capture here. The concept of 'cost of living' was born in the late nineteenth and early twentieth centuries, along with modern economic science, as a device to index human lives with numbers and amounts of money. The minimum necessary to produce life has a price (for example, the monetary value of a basket of goods). Prices also vary and these variations are represented in percentages relative to time segments: weekly, monthly, annual. Thus, in the world of specialists, the cost of living is intrinsically linked to two major aspects: first, to the understandings of inflation as a social fact and as an object of government; second, to the concept of necessity or basic needs. The field of production of inflation and cost of living numbers is an arena of controversies in which government agencies, corporate institutions, trade unions, international organizations, and humanitarian agencies participate, producing configurations of national and international public debate and political battles.

Yet, at the same time, the concept of cost of living also exists outside the realm of economic experts and of those involved in the government of economic life. Cost of living is a practical category that goes beyond a numerical index: it participates in the flow of ordinary life, of individuals, households, and families. It refers to a myriad of costs and efforts giving meaning to actions, strategies, daily joys, and frustrations, as well as to social movements and hidden transgressions, such as those launching claims against inflation or expensive living.

> ## Filling a gap

The universes of economic science and humanitarianism have conceptualized the rising cost of living, famine, and hunger. For the social sciences, however, these phenomena seem to remain marginal objects that, with few exceptions, do not enter the agenda. The aim of this thematic section and the special issue of *International Sociology* is precisely to fill this gap. To do so, we propose an approach that is both multidisciplinary and multi-scalar. The articles in this volume travel through various thematic and disciplinary traditions: political sociology and economy of markets, prices, and numbers; economic and feminist sociology and anthropology of ordinary practices and their affective, intimate and sensory dimensions; and the political ecology of food and life. At the same time, the articles gathered here show the entanglements between international geopolitical issues, the massive weight of humanitarian organizations and aid in defining cost of living indicators in local contexts, national modes of government and their colonial histories, and the intimacy and sensoriality of the cost of living in the daily life of peoples and families.

Public debates, expert knowledge, and ordinary citizens' concepts and practices may be in conflict, but they also intermingle and construct each other. Indeed, sociology and anthropology can reveal this co-construction with the tensions, conflicts, and circulations that it implies. A comparative and historical perspective also sheds light on how the cost of living is unevenly distributed, how these inequalities change over time, how policymakers, experts, and families navigate crisis, while mobilizing or ignoring social dispositions built up over the course of other crises.

We focus on these processes from a comparative perspective in a double sense: by considering past and present situations in the Global North and Global South; and by relating macro processes on a national and international scale to the micro dimensions of the everyday search for a life worth living amid inflation, famine, and hunger. These entanglements of scales and processes revive questions of power relations, moral debates about what is legitimate, acceptable, normal or basic and what is not, and according to whom, as well as disputes on what a life worth living is, with strong variations depending on national contexts and histories, gender relations, and racial and class differences. ■

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> Misalignments:
House Money and Inflationary Experiences

by **Eugênia Motta** and **Federico Neiburg**, Federal University of Rio de Janeiro, Brazil

Maré Complex.
Credit: Brasil de Fato, 2020.

In this article we address how residents of a *favela* area known as the "Complexo da Maré" (Maré Complex), in the city of Rio de Janeiro, experienced price increases, particularly in food and energy, during 2021 and 2022, still in the context of the COVID-19 pandemic. We use the concept of *alignment* (and its derivatives, such as *misalignment* and *realignment*) to analyze the different ways of navigating an increase in the cost of living through accommodating material changes and future perspectives at different scales: from the ideals of a good life desired by people and families, to decisions that need to be taken immediately or in the near future. We call *alignment work* the daily activities through which people and families dealt with the instability of income, variation in money flows, management of frustrations regarding the restrictions imposed by inflation, and the maintenance of significant ties, which were placed at risk or altered by the crisis. These activities involved, for example, constantly assessing price differences, moving around in new ways in the city, (re)classifying expenses, and changing the way products were bought and sold. Thus, alignment work is a combination of ways of imagining, calculating, projecting, and living together, articulated in evaluations about what, how, where, and why to buy or sell.

> Extraordinary events and ordinary lives

The COVID-19 pandemic, together with the corresponding economic contraction and increases in the prices of basic goods were experienced in diverse ways, revealing distinct means of coping with extraordinary events through the flow of ordinary lives. For some of the people we spoke to, during this period things were not so different from their permanent routines of instability, poverty, and struggle. This allowed them to activate strategies cultivated throughout their lives and across generations. For others, inflation and a loss of income combined with other events, such as illness and death in the family, accentuated a feeling of exceptionality. For still others, the pandemic and the ensuing increase in prices opened up new possibilities and opportunities. These variations are at the heart of the differential process of producing inequality that is linked to inflation and a rise in the price of foodstuffs – considering that, in the Maré Complex, the first three items on the family budgets are, respectively, food, debt repayment, and residential services.

In terms of both mobility (which was restricted by policies aimed at preventing the spread of COVID-19) and

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the instability of income sources, the lives of those we interviewed are molded by temporalities that are at once *disruptive* and *recurrent*. However, even in such a context of routinization of crises, price spikes (particularly of food and cooking gas) hit at the heart of the principal space where the reproduction of life is acted out: the household. This is why times of inflation demand intense and specific realignments (between the reality of domestic economies, routines, and expectations), such as changes in eating and cooking habits, re-prioritizing of what one considers to be 'basic spending', re-converting income-generating activities, taking on debts, or using the many emergency aid packets provided by the government.

Houses are the main loci where the lives of those we talked to are reproduced, and the kitchen is the heart of the activities of care that make a home and the people who inhabit it. Thus, changes in the routines of buying, preparing, eating, and sometimes selling food are crucially affected by the rising price of food and gas. Houses (*casas*), in our view, are at the same time material, affective, and symbolic spaces, shot through by solidarity and tensions that are characteristic of ties of proximity, structured by gender and generational relations.

> **House money**

Contrary to the image projected in the category of *domestic*, instrumentalized in statistical research in general and in food security surveys in particular, households are not isolated entities. They form part of networks and configurations of houses. The proximity or distance between them (or their greater or lesser relative isolation) is a crucial element in the construction of social distances. Moreover, houses are not only sites of consumption, but also places generating income through the sale of repair services or personal care and the preparation of food for sale.

The residence itself, or a window or a room, can serve as a marketplace. Sales may occur occasionally or with some regularity and at times other members of the household or of the configuration of houses help out.

The key to describing the dynamics of households during a period of inflation, and particularly in the context of rising prices of foodstuffs and gas, is the concept of *house money* (*dinheiro da casa*): a native expression that allows us to study the different meanings of money and monetary practices from the vantage point of domestic spaces. The concept of *dinheiro da casa* designates a moral and practical nexus between people, money, and houses that places value on the communal or common needs for the maintenance of the house as a living processual space giving rise to expenses that are obligatory in nature and regular, such as rent, services, and food. It is hence possible to look at the strategies aimed at aligning disturbances in these different aspects (particularly the reduction in spending power) with a redefinition of what are considered necessities for (re)producing life.

> **An ethnographic critique of inflation**

The concept of *alignment* occupies a central place in economic theories of inflation. The so-called monetarist perspectives explain inflation as an effect of the excess of currency on offer and the mismatch of expectations with rising prices. Visions considered to be heterodox explain inflation by identifying maladjustments in productive chains and disequilibria caused by distributive disputes. Based on the specific and daily experience of increasing costs of living of those we spoke to in the Maré Complex, and adopting a pragmatic perspective on money that considers the sensorial dimension of inflation, we propose an ethnographic critique of the concept of inflation itself. ■

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> Coping with Inflation
in Contemporary Argentina

by **María Clara Hernández**, Universidad Nacional de General Sarmiento, Argentina, and **Mariana Luzzi**, Universidad Nacional de San Martín, Argentina

Credit: Vitória Gonzalez, 2024.

In recent years, and after a long time, inflation has returned as a central issue in the economic and political agenda of different countries. The sources of price increases and the policy instruments available to tackle them have become matters of discussion among experts inside and outside governments. But how do people cope with inflation daily, and what can sociology tell us about it? Many questions arise when considering how rising living costs impact household economies. In what specific ways do agents refer to inflation and incorporate information about price increases into their everyday practices? How does price variation affect the projection of calculations and

transactions over time? What accounting methods are implemented in contexts of persistent inflation?

In this article, we address these issues based on recent research on the case of Argentina. On the one hand, we analyze how rising prices appear in people's concerns. On the other, we demonstrate the ordinary ways of measuring inflation that we have observed when focusing on domestic economies. Drawing on economic sociology, we highlight two central issues linked to the rising cost of living. First, there is the question of how households experience living with escalating inflation; second, there is the interest in

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producing lay knowledge about economic phenomena and their relationship with the theories and tools created by experts to address them.

> Inflation and everyday economic life in Argentina

Argentina stands out as a country with a long history of inflationary problems. It is also one of the few countries that had already shown high annual inflation in the present century before the COVID-19 pandemic. Between 2003 and 2006, the inflation rate averaged less than 10% per year in Argentina, while from 2007 to 2021, it jumped to over 30%, reaching 94.8% per year in 2022. As a result, for at least the last 15 years, inflation has been an issue of public concern nationwide.

Between 2017 and 2020 we conducted research among low- and middle-income households in a medium-sized city in the province of Buenos Aires. Our goal was to study the configuration of household economic practices in the context of sustained and rising inflation, considering consumption and budgeting, saving, and credit practices. We complemented our research findings with observations made in a different study focused on household economies during the COVID-19 pandemic. In the latter case, although effects of inflation were not a specific target of the study, they did play an essential role in its results. The fieldwork for this study highlighted the significance of price increases for the concerns of the households we interviewed.

Considering the literature on inflation and its effects on consumer behavior, one of the main contributions of this paper is the construction of a perspective on inflation that is not restricted to examining moments of acute crisis. Instead, our approach can account for both things that change and things that stay the same when a generalized increase in prices, far from being an exception, becomes part of everyday economic life. This perspective is not limited to the macroeconomic aspects of the phenomenon but incorporates a detailed look at how it can affect the daily practices of economic agents.

> Our main findings

Our research shows that the links between expert knowledge and everyday practices and perceptions are not straightforward and tend to be more complex than is usually assumed. Even during periods of significant price increases, people rarely use erudite terms or incorporate technical measurements to comment on inflation when discussing the household economy. Instead, the main issues in everyday conversation are the increase in the price of specific goods that are considered essential in household consumption, or the rising cost of those products historically used to predict what may happen with the price of other goods (such as fuel or the dollar). Both references are forms of expressing the general behavior of prices and the diminishing purchasing power of money. Moreover, focusing on the specific forms of calculation that enable households to come to grips with the evolution of inflation (the so-called "homespun measures of inflation"), our research shows specific ways in which information on prices influence the criteria used to organize daily consumption and the allocation of household monies.

Finally, our research also suggests that contrary to what the literature concerning previous historical periods has reported, the strategies deployed by households in the face of inflation seek, first and foremost, to ensure consumption by adapting the rhythms, locations, or kinds of purchases. So, speculation or seeking gains by taking advantage of inflation was not the dominant reaction to price increases we encountered during our fieldwork. However, as inflation in Argentina persists and accelerates, with the consequent effects on real wages, strategies could be transformed. Future research will enable to reveal whether and under what conditions the practices observed in previous periods of high inflation return or not.

In a time when inflation once again becomes a global challenge, analyzing the Argentine case helps to illuminate how specific micro-social dynamics linked to inflation unfold empirically. Along these lines, global dialogue on this topic could be stimulated by addressing native ways of experiencing and dealing with price increases in other contexts. ◼

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> The Role of Yuca
in Sustaining Precarious Populations in Ecuador

by **Cristina Cielo** and **Cristina Vera**, Latin American Faculty of Social Sciences (FLACSO), Ecuador

Producers collect yuca.
Credit: Ministry of Agriculture and Livestock, Ecuador.

How do precarious populations experiencing unmet needs sustain themselves? How do they nourish themselves not only materially but also in meaningful social terms, and what is the relationship between objective and subjective sustenance? We argue that communities' relationships to food help shape their experiences of crises. The French term *la vie chère* simultaneously invokes affective relations, collective valuations, and high prices, indicating the importance of all these dimensions in understanding experiences and responses to rising costs of living. In this sense, we show that specific affective food ecologies can influence people's possibilities for material sustenance.

Our study compares the importance of yuca – a regional term for the tuber also known as cassava and manioc – in a coastal and in an Amazonian province of Ecuador: areas in which relationships to yuca have been shaped histori-cally as well as by expert production of knowledge of the tuber. Through the study of yuca in a country where only a third of the economically active population holds a full-time job and earns a basic income of $450 per month or more, and where basic consumer goods cost a family of four $763 per month, we seek to shed light on trajectories of social reproduction in contexts of scarcity. We show that the key to people's incorporation of yuca into livelihood strategies are histories of colonization and exploitation of both land and people that shape social relations and those between people and nature, reinforcing the relational role of yuca in diverse ecologies.

> **The promise of yuca**

The study of yuca, more generally, is of current global interest due to a shift in its racialized reputation as a "poor man's crop"; it is extensively produced and consumed in

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Africa, Asia and Latin America, with most of it being cultivated by small-scale farmers in economically and ecologically marginal areas. With the intensification of climate and economic crises, the drought resistance of yuca and its capacity to grow in marginal, infertile, and acidic soils, as well as its efficiency in terms of energy production – yielding more calories per hectare than rice, wheat, or corn – promise to help feed burgeoning populations of the Global South. It is now heralded as the 'root crop of the century'. In Brazil, for example, most of the caloric intake of poor populations is through yuca consumption. World yuca production has increased three-fold since the 1980s and it now has the highest production by volume of any crop in Nigeria.

The Green Revolution of the mid-twentieth century was driven by initiatives to feed the world's growing population while increasing US political and economic influence in postcolonial states. In 1971, the World Bank-led Consultative Group for International Agricultural Research (CGIAR) included agricultural research centers established in Mexico, the Philippines, Nigeria, and Colombia to improve the productivity of staple crops. In the 1980s, Colombia's International Center for Tropical Agriculture (CIAT) began working with Ecuador's National Institute of Agricultural Research (INIAP) to promote the role of the production of yuca in supporting local and national development. With material and technical support from CIAT, INIAP's agricultural scientists worked to increase the productivity of yuca cultivation, while government and development institutions coordinated with CIAT to encourage micro-entrepreneurial ventures to process and commercialize yuca products.

> ### Contrasting experiences: post-colonial inequalities versus the "living forest"

Those initiatives found fertile ground, literally, in Ecuador's coastal province of Manabí, where one of INIAP's experimental stations is located. With access to both the sea and arable valleys, the region has been characterized since the colonial period by its agricultural and commercial importance. Consequently, land in Manabí has long been held by dominant classes – first, colonial powers; later, Republican criollos; and more recently, powerful wealthy families – and its use has been driven by the agro-industrial export crops of coffee, cocoa, and bananas, leading to profound social and land distribution inequalities. Agricultural development projects have sought to exploit yuca's potential to mitigate these inequalities, particularly in the face of a persistent lack of stable employment.

In contrast to yuca's symbolic and economic role in the coastal province of Manabí, in the Amazon it has occupied a very different place within the food, cultures, and gender relations of indigenous groups since its domestication in the Amazon basin over 3000 years ago. *Chakras*, exclusively cultivated and cared for by women, are nurtured systems of diverse flora and fauna that mimic the forest's natural ecology. Yuca holds a special place in Amazonian *chakras*; it is one of the few products that is considered kin, and more specifically, one's own progeny. Women's care for yuca and their *chakras* constitutes affective labor that is indissociable from caring for one's own and collective well-being.

Local organizations have recently succeeded in obtaining official recognition of the *chakra* as a Globally Important Agricultural Heritage System by the United Nation's Food and Agriculture Organization. Women cultivating yuca and the *chakra* embody the indigenous movement's anti-extractive "living forest" proposal and its symbiotic, cosmological, and relational understanding of sustainability. Key in the definition of this proposal has been the collaboration between indigenous intellectuals and other academics and anthropologists.

> ### Interdependence of different dimensions of food helps overcome crises and inequalities

The pandemic and climate crises have thrown into stark relief both vulnerabilities and food insecurities derived from globally structured and locally lived inequalities, as well as responses to these urgent needs. Although productivism remains at the center of food security analyses and initiatives, interdisciplinary perspectives that highlight interdependence allow us to identify our role in interconnected processes of cultivation and consumption.

By understanding the affective, ecological, and political economic dimensions of food, we have examined disparate and unequal contexts for sustainability, through the organization of diverse elements that constitute specific political socialities, living assemblages, and inventions against precarity. The differential incorporation of yuca into responses to multiple and increasingly acute crises highlights the ways local histories and expert interpretations of social, biological, agricultural, and developmental dynamics shape contemporary social relations as well as those between people and nature, understandings of common life and futures, and possibilities for negotiating and disputing existence. ■

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> Moral Dilemmas
in Food Provisioning

by **Susana Narotzky**, Universidad de Barcelona, Spain, and **Bibiana Martínez Álvarez**, Universidad de Santiago de Compostela, Spain

"Fair price. Production cost". Credit: Personal archive of the authors.

The specific conceptualization of the costs of everyday life we consider in this article stems from an interpretation of the phrase "cost of living" which addresses: (1) macro indicators of inflation, (2) the difference between food produce price and the consumer price as a cost to farmers that endangers their viability, and (3) how this cost gets expressed in the wages of workers and endangers their livelihood. Finally, we highlight the energy that needs to be invested to ensure social reproduction at the scale of individuals and households – workers and employers in agriculture – and at the scale of entire political communities, such as the nation-state or the European Union.

> Political economy and the moral cost of living

The expression "cost of living" here expands into the multiple and situated meanings of what it costs to live and the practices that those meanings support. This effort is translated into moral dilemmas that produce and mediate material results – in people's bodies, in the environment, in political mobilizations of different kinds. We base our theoretical exploration on the "moral economy" framework that stresses the centrality of moral values, practices, and emotions in channeling economic and political behavior. The strength of the concept rests in the expression of moral values and obligations through material provisioning, resource allocation, and capital accumulation. In sum, the perspective we adopt attempts to understand moral aspects of economies as integral to the processes of political economy.

> Being essential, avoiding inflation, and being fair

As the COVID-19 pandemic took hold, one of the major preoccupations of the Spanish government was to maintain the continuous provisioning of food and prevent excessive inflation. Laborers and farmers working within the food chain were branded as "essential" because they pro-

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duced a critical good: food. Although arguably a utilitarian category, the concept of "essential" was eminently moral. Speaking in terms of the "essential" – what confers its "essence" to a community – shifted the economic conversation to the domain of the "common good", and hence to the realm of morality.

Yet, workers, farmers, food distribution firms, consumers, and the government understood the moral imperative of food provisioning from differently situated positions within the food chain. These conflicting meanings and the actions they encouraged are the "moral dilemmas" this article addresses by unpacking: (1) inflation, a technical – albeit morally charged – concept that justifies policies, (2) "just prices", a concept put forward by farmers in discourse and mobilizations, and (3) "fair wages", the livelihood-centered objective that informs many workers' struggles. Neither this call for "just prices" on the part of the farmers, nor the claim for "fair wages" on the part of workers was new. What was new was the public focus on consumers, the importance of avoiding food scarcity and inflationary pressures on food prices in a context of unemployment, furlough, and general income reduction in most households.

In our article just published in *International Sociology*, we analyze the Spanish inflation data for food products, and in particular fresh food products starting with the 2020 negative inflation period and continuing up to the present. In 2020, as Europe went into lockdown, consumption of many things stopped or declined abruptly with two major consequences: first, people's incomes diminished because of unemployment or furlough; second, people's major expenses became centered on basic items related to livelihood, amongst them, very saliently, food. While the shortage of labor was the main argument for the rise in food prices during the initial months of the pandemic, this lost strength with the end of lockdown. The post-pandemic inflationary surge was related to the increase in the cost of inputs (fuel, fertilizers, labor) and to a drought that affected productivity, but farmers blamed distribution chains for increasing prices even when farm-gate prices remained stable. Farmers voiced their claim for "just prices" and mobilized accordingly. We have analyzed the chain of prices from farm gate to consumer outlet, following an index produced by farmers together with consumers' associations, in order to assess price variation, and we have compared it with the discourses of different stakeholders, showing the moral entanglements of evidence.

> Material and moral valuation of farm work, provisions, and human life

Farmers indicate recent increases in the minimum wage as one of the factors that endangers the viability of their way of life and the social reproduction of their households, and which leads to inflation. This fear for their viability allegedly justifies the extreme and exploitative conditions that farmers impose on day laborers. However, agricultural workers claim "fair wages" and denounce farmers' irregular practices. The concept of fairness as voiced by workers refers to living wages, to working conditions, and to being respected. It encompasses a complex valuation process that includes material and moral criteria that make social reproduction possible. While the lives of day laborers represent a "cost" to farmers, the efforts of farmworkers to seek fairness underscore what living actually costs.

Our article explores the connectedness of the three aspects of the "cost of living" that we have analyzed in the crucial sector of food provisioning: inflation, unjust prices, and unfair wages. As food is an unavoidable input to human life, we reflect on how the systemic cost of sustaining life is extremely high, beyond the circumstantial aspect of post-pandemic inflationary pressure in Europe which has been mostly attributed to supply chain stress and energy prices. Is the cost of living a conjunctural episode, as we are made to believe, or is it structurally embedded in our economy?

Not only do we ask what the cost of living is, but also which lives become a cost and, conversely, what living costs in terms of the effort to produce a livelihood. The practices we analyze are always infused with moral, albeit divergent, arguments about what is best for society. The moralities at play, however, are expressed in different quantitative indexes as well as in qualitative discursive attributes that describe human action: justice, dignity, and fairness. These kinds of evidence converge in the struggles to achieve a "better life", arguably a life at a lesser cost. The moral dilemma of social reproduction lies in questions such as these that probe what the cost of living means to different people in different social positions. ■

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> Tracking the Cost of Living in Madagascar

by **Florent Bédécarrats**, Institut de Recherche pour le Développement (IRD), France, **Flore Dazet**, EHESS Paris, France, **Isabelle Guérin**, **Mireille Razafindrakoto** and **François Roubaud**, IRD, France

Majunga market, Madagascar.
Credit: Fleur28 / Wikimedia Commons.

Measuring the cost of living is crucial to understanding a country's economic, social, and political fabric. Yet, it is fraught with complexities and controversies that stem from the diverse interpretations of "cost," which involve values, technical capabilities, resources, and power dynamics. Despite its limitations, the Consumer Price Index (CPI) is often employed as the main proxy of living costs, thereby both reflecting and shaping economic conditions. The CPI is used as the key indicator of inflation, it plays a pivotal role in measuring poverty rates and purchasing power parities, and acts as a deflator for the GDP portion attributed to the informal sector. Additionally, the CPI is instrumental in indexing and negotiating wages, pensions, and social transfers; and in the structuring of aid programs and financial obligations. Previous studies have explored the socio-history of the CPI in developed countries and hyperinflationary contexts, revealing its influential role in shaping welfare states and salary regulations. This body of research delves into how changing power dynamics, societal actors, and the growing role of private and financial sectors shaped the development and application of the CPI.

> The case of Madagascar: three indicators as imperfect and unsatisfactory proxies

However, a critical gap remains in understanding how the production and use of cost of living metrics operate in fragmented economies and weak states. To address this gap, in this article we examine the case of Madagascar: a former French colony where self-subsistence persists and partly escapes the market due to self-consumption farming, hunting, and gathering. Madagascar combines chronic food insecurity, extreme poverty, and a fragile state under an aid regime. Our research uses several sources, including our own (reflexive) experience as producers of statistical data in Madagascar, participant observation in a humanitarian NGO that generates its own data, and interviews with various actors involved in the production and use of price data.

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Our analysis reveals three ways of grasping the cost of living: the National Statistical Institute's CPI, used for macroeconomic steering and negotiations with international donors; alternative analyses and sometimes surveys produced by research teams concerned with accounting for the persistence of poverty and inequality; and indicators and surveys of humanitarian aid actors, aimed at steering aid distribution and focused on areas and populations at risk of famine. We question the making and use of indicators as an imperfect and unsatisfactory proxy to account for the cost of living, and show that technical modalities reflect contrasting visions of what counts and who counts or not, and are also indicative of who governs and for what purpose.

> Expert economic and humanitarian interpretations

CPI experts define the cost of living as an average consumer price supposedly valid on a national scale. In Madagascar, however, and despite efforts to adapt it to the Malagasy context, the CPI reflects a partial reality, biased in favor of the formal economy, a well-off urban population and based on outdated consumption behavior, ignoring the failure and degradation of public services and the various costs (additional price, loss of "utility" or well-being, loss of time, etc.) that this implies for the population. It should be noted that a chronic lack of human and financial resources limits the ability of statistical experts to address these shortcomings, despite being largely aware of them.

Economists specializing in poverty and inequality define the cost of living as the result of individual (or household) consumption behaviors that vary according to social groups, space, and time. Specific statistical surveys adapted to local contexts highlight, for instance, wide variations in household consumption practices over time to cope with crises, the specific characteristics of rural households, the crucial importance of self-consumption, the extent of the deterioration in public services, and the resulting loss of well-being.

Humanitarian actors define the cost of living as a physiological minimum necessary to avoid malnutrition. They produce their own surveys (including price surveys), data and indicators, and this production is both abundant and impressive in terms of the degree of technicality (even if far removed from the "best practices" usually used for the CPI) and the resources dedicated to the task. Despite efforts to carry out participatory surveys, these are difficult to translate into numbers and local populations most often express themselves indirectly, by transgressing humanitarian policies and interventions according to their own standards of justice.

> An impossible mission under fragmented government and national diversity

Each of these forms of expertise has its own raison d'être. Their promoters are rarely fooled by the weaknesses and limitations of their numbers, but they have a mission to accomplish and objectives to reach. They measure what they want to measure and what they can measure. As with any type of number, the numbers they produce serve as much to explain reality as to make it legible and to shape politics. Beyond the diversity of values concerning what counts and should be counted, the diversity of cost of living numbers illustrates a fragmented mode of government, in which NGOs and international organizations play a leading role. The lack of legitimacy of national price data, which reflects and crystallizes the weak legitimacy of the Malagasy State, authorizes and encourages aid agencies to produce their own data. The result is a self-poietic dynamic in which the data produced justifies both the urgency to act and the indispensability of humanitarian and development actors.

The profusion of indicators and analyses also reflects the economic and social fragmentation of the country. The CPI is supposedly "national," but represents only a narrow fraction of the population and the economy (urban and market-based). There is not one economy but a plurality of separate and sometimes incommensurable economies. Much effort by research teams and humanitarian actors, sometimes in isolation, sometimes in collaboration, goes into gaining a better understanding of this plurality. However, these efforts cannot account for the specificities of the cost of living in a context where the informal economy, self-consumption, social and symbolic expenditure, hunting, and gathering represent a significant part of livelihoods and of a life worth living.

With the rise of nature conservation policies, these issues can no longer be ignored. Madagascar has a very ambitious conservation policy which seriously threatens the hunting and gathering practices of many villagers. So far, it is the poorest who are already paying the price for biased and approximate price indices, and this is likely to worsen if better methods of analyzing the cost of living are not applied, including taking into account its dimension of dignity and life worth living. ■

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> The Power of Price Subsidies in Morocco

by **Boris Samuel**, Institut de Recherche pour le Développement and Institut des Mondes Africains, France, and **Beatrice Ferlaino**, University of Bologna, Italy

Credit: Personal archive of the authors.

The Moroccan system of subsidies – which actors refer to as *compensation* – organises the markets for products that the government designates as "strategic", principally because of their importance for household purchasing power: butane gas, flour, bread and sugar. Our work offers a historical sociology of this system, which has persisted until today despite the criticisms it has received since its inception and repeated promises to dismantle it. This "compensation" emerged from the pricing policies adopted by the French Colonial Empire in the inflationary context associated with the Second World War (1941), and governs the consumption, production, and marketing of products. It is the incarnation of the "*État grenier*" (the granary state), which legitimised its power in the eyes of the people by ensuring subsistence and by preventing social unrest. We demonstrate that the resilience and transformations of this Moroccan system of subsidies, which has survived the economistic criticisms of international financial institutions, can be analysed by considering the power relations which support it.

> ## > Subsidising basic products

Moroccan subsidies on basic products involve a variety of mechanisms, and address different economic is-

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sues depending on the product: flour, sugar, table oil or butane gas (and fuel, until the liberalisation of the sector in 2015). The term "compensation" is also invested with various socio-political meanings by different actors; these tend to be associated with the state's preoccupation with maintaining household purchasing power, as well as with the rentier logic of the large economic groups in search of profit. State intervention through the markets makes it possible to regulate economic and political rivalries and alliances, notably in connection with the Royal Palace. The uses of the word "compensation" can also deviate from its strict official meanings. Government payments aimed at maintaining a low and stable price of bread, for example, are not formally labelled as compensation costs, even though as far as the actors are concerned, they are part of this policy. The compensation policy in Morocco is rooted in the history of the exercise of power, and the generic category of "compensation" is emic.

> **The bureaucratic artefacts of compensation**

In the political terrain, there are bureaucratic artefacts of compensation; notably, the "price structures" frame actors' practices and are a way of exercising power in contemporary Morocco. The bureaucratic and financial procedures of compensation reinforce or establish hierarchies within sectors: in the cereals sector, for example, the bonuses granted to farmers secure the profits of seed producers. The way subsidies are calculated also appears to allow questionable profits to be made, as in the butane sector, indicating that the public authorities have a degree of tolerance towards the fraudulent appropriation of public resources. Finally, the price administration mechanisms enable operators to obtain acknowledgment of their alliances with the state. For example, in the flour market, the distinction between the two subsidised types of flour, for the entire country and for the Saharan provinces, is reflected in the value of the subsidies – the most significant ones currently being reserved for the Casablanca mills. Because their use is embedded in power struggles and competitive relationships among operators, the system of subsidies plays a mediating role in the renegotiation of political relations.

> **History of subsidised prices**

The history of subsidised prices is also one of reform, with changing political legitimacy. At the beginning of the 1980s, the Bretton Woods institutions deemed subsidies to be too costly and ineffective at reaching poor households. But the compensation reform was interrupted by the opposition expressed during the so-called "bread riots" of 1981 and 1984. However, rampant government actions continued to reduce the breadth of the system up to the end of the 1990s. In the first decade of this century, King Mohammed VI launched initiatives with the aim of gradually replacing subsidies by transfers targeting the poorest areas and households. But after the so-called "Arab Spring" protests of 2011, the idea that suppressing compensation would result in political and social turmoil took root, even in international institutions and rating agencies. The idea of a simple status quo around compensation is not, however, pertinent to understanding the political transformations that are underway.

At the beginning of this century, the legitimacy of reform increased. Numerous technical studies pointed out opaque and unequal management of compensation – with the wealthiest 20% of the population receiving 75% of the awards. The debate on reforming subsidies also structured partisan politics. Abdelilah Benkirane of the Islamist Justice and Development Party (PJD), who was Prime Minister from 2011 to 2017, made the suppression of compensation in favour of targeted financial transfers one of his principal battle cries for taking power. It therefore seems more appropriate to understand compensation reform as part of a period combining transformation and resilience, rather than as a linear dismantling marking the transition from a time of state interventionism to one of free markets.

> **Protests against price rises**

Protests against price rises, often analysed as mechanical reactions to the high cost of living, are a broader challenge to the political order, and have marked Moroccan history. Between 1981 and 1990, during the period known as "les années de plomb" (the "lead years"), the large-scale popular demonstrations that took place in 50 towns across the country, labelled as "bread riots", have frequently been presented as unorganised outbursts of violence provoked by an increase in the price of bread. However, these uprisings, which were severely repressed, were organised by political movements and reflected a profound and widespread questioning of the legitimacy of the exercise of power by Hassan II's regime. They responded to years of intense political violence and severe restrictions on the freedom of expression and opposition. Prices are a privileged means of expressing protest. In the wake of the so-called "Arab Spring" revolts in 2011, for the government, action in favour of purchasing power was also a way of displaying the state's benevolence towards its citizens. The implementation of subsidies is a frequent countermeasure in the face of contestation. ◼

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> Food Security in Times of War:

The Case of Russia

by **Caroline Dufy**, Sciences Po Bordeaux and Centre Émile Durkheim, France

Credit: Marcson / Pixabay.

Food security has been a cornerstone of the campaign to eradicate hunger and extreme poverty, which is one of the Millennium Development Goals (MDGs) identified by major international development organizations. Complex and multi-faceted, the concept of food security was defined by the United Nations (UN) World Food Summit in 1996 as based on four pillars: the availability of food, access to it and opportunity to use it, utilization and stability of the three pillars over time.

Despite the growth in agricultural production, this objective is under threat as a result of the successive crises that have occurred since the beginning of the twenty-first century. Whether financial, related to health or geopolitical, these crises have been associated with significant accelerated variations in food prices. Since 2014, and especially in 2022, Russia's invasion of Ukraine has rekindled the risk of food shortages, and we have seen hunger riots in the Global South, inflation in the Global North, and disruptions in production and supplies in war zones around the Black Sea that represent global breadbaskets. Against this backdrop, global food security has regained a prominent place in international debates from the point of view of the many associated risks to agricultural markets, production, and trade. The resur-

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gence of war in Europe since 2014 raises questions about the prioritization of this promise: How are the problems of food insecurity framed, and by which actors? Which populations are concerned? Does war change the way in which the issue of food security is mobilized?

> **Food security in Russia: a rhetorical construct and legitimizing strategy of ruling elites**

The context I mobilize to answer these questions is that of contemporary Russia since the launch of the invasion of Ukraine in 2014, as a country that is a leader exporter of grain on world markets. The methodology I adopt employs discourse analysis, based on a preliminary field survey conducted in the Russian agricultural world between 2015 and 2018 and on the public speeches of central Russian authorities since 2022 (mainly the President and the Security Council of the Russian Federation).

Theoretical approaches to the public issue of framing have shown how the mobilization of rural actors has promoted the emergence of alternative models. In South America, for example, the *Vía Campesina* movement has advocated food sovereignty for peasant communities. Thus, how a public issue is framed can offer a specific definition of the situation and related problems: it is the result of the cognitive, discursive, and political work of actors seeking to make a certain construction of the problems prevail over others.

Following these conclusions of pragmatic sociology, my research apprehends food security in Russia as a rhetorical construct and as a legitimizing strategy of ruling elites. In this context, three specific features can be highlighted. Firstly, the discourse designates a "political common" in a broad sense, articulated either via the notion of power or through that of sovereignty. Moreover, this discourse depends on an international context that distinguishes an "us" from a global "them". By historicizing public issues, we can account for the transition from a conception of food security based on international integration in the first decade of this century to the nationalization of agri-food

issues. Ultimately, this discourse has structuring effects, understood through agricultural and food policies in Russia since 2014. This enables us to comprehend how promoting policies to substitute agri-food imports from Western countries has fostered the nationalization of food issues and the restoration of the country's agricultural export power since 2014.

> **Changing discourses and competing views of food security**

Since 2014, the rhetoric of global grain power based on integration into international markets as part of Russia's accession to the World Trade Organization has given way to political discourse in favor of national sovereignty based on food independence. The regime of international sanctions played a pivotal role in this evolution, reinforced by embarking on large-scale warfare in Ukraine in 2022.

The grain agreement signed in July 2022 between Russia and Ukraine under the aegis of the UN and Turkey created a humanitarian exception in a context and zone of high-intensity warfare. The intention behind it was to promote grain exports on world markets and ease price pressures. Russia denounced the agreement and refused to extend it beyond spring 2023.

This discontinuance brings to the fore the confrontation between two views of food security: the liberal and the protectionist. The former focuses on international trade as a factor to promote general prosperity, growth and a positive-sum game. It is supported by international organizations such as the UN, the Food and Agriculture Organization and the World Food Program. This perspective spearheaded agricultural modernization in Russia in the first decade of this century. The latter is authoritarian and productivist, supported by references to power and a zero-sum game. The circulation of goods is organized and controlled by the state. This is the latest narrative, produced by the executive branch of contemporary Russia, that has taken hold since 2014. It is hardly challenged by any alternative rhetoric, which, if it exists at all, remains marginal. ■

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> 'openMovements':

A Platform for Public and Global Sociology

by **Breno Bringel**, Rio de Janeiro State University, Brazil, and Universidad Complutense de Madrid, Spain, and **Geoffrey Pleyers**, FNRS and Université catholique de Louvain, Belgium, and ISA President (2023-27)

Credit: Raul Pau.

The climate meltdown has become a visible reality, and in the meantime, during the global summits, governments only demonstrate a lack of capacity and willingness to tackle this urgent issue. Democracy is under serious threat in various regions of the world. Technocrats conduct major trade negotiations, and citizens have little impact on these decisions. Authoritarianism has gained impetus, as have nationalist and far-right movements. Hate speech and intolerance are on the rise, leading to racist or hate crimes and increasing political polarisation. We have entered a more complex scenario of interlocking and mutually reinforcing crises (polycrises) that challenge the civilisational model based on unlimited growth, progress, and development. Moreover, the crises of our world do not affect everyone in the same way. The Oxfam Inequality Report 2024 points out that, since 2020, the wealthiest five men in the world have doubled their fortunes. During the same period, almost five billion people in the world have become poorer. Inequalities are at a historical high.

These challenges remind us that social movements are crucial actors in our societies. Reactionary, supremacist, racist, and far-right movements are gaining momentum in the West and the East. They are attracting young people from all regions of the world. All the countries that witnessed massive democratic protests during the 2011 Arab Spring are now ruled by authoritarian regimes. Even in some of the most established democracies, social movements are repressed, journalists are killed, and citizens are spied upon by their states.

This bleak picture is, however, incomplete. Alternatives still exist but are often made invisible, especially in the absence of public protests. All around the world, insightful social movements and new forms of activism and democratic practices have been emerging. They open horizons of possibility and challenge our classic perspectives about what activism, social movements, and democracy mean today. Citizens have occupied squares and the Internet to organise, diffuse their messages, and promote an open, free society where knowledge and information are shared. They consider democracy not only a matter of polls or demands addressed to their governments but also a claim for social justice and dignity as much as a personal commitment they intend to implement in their activist and daily life practices.

> ### Social movements: protests, alternatives, and knowledge

Our new *Global Dialogue* section, "openMovements," aims to literally open a space to analyse social movements and their challenges in different countries worldwide. Based on empirical research, the articles will discuss movements' successes, limitations, and the backlash many of them face. We will learn from and with social movements to better understand our society and the challenges we face locally, nationally, and globally.

We believe that social movements are significant actors in the production and transformation of society, both on the progressive/democratic and reactionary sides. Social move-

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ments influence concrete policies and transform culture. They produce knowledge and generate collective learning in concrete struggles and social experimentations set up on all continents. They shape how we see the world and open scenarios for alternative futures.

While protests may gain some visibility in mainstream media, they are only the tip of the iceberg of social movements. Less visible but not less critical dimensions include popular education, concrete solidarity, active citizenship, transformation in daily life, and subjectivities. openMovements will welcome contributions on protests and concrete alternatives.

> Global sociology

A global dialogue rooted in the will to learn from sociologists and actors from different continents is at the heart of the ISA. As a new section of *Global Dialogue*, openMovements promotes a global outlook for understanding these social transformations by proposing analyses by sociologists from all regions, both in the Global South and the Global North. We are convinced that learning from social movements, crises, and alternative experiences from different continents provides insights for a better understanding of the reality, challenges for democracy, and possible paths to emancipation and social change in our country or region.

We promote a global outlook on our world's transformations and, to do it, avoid both methodological nationalism and globalism by fostering a dialogue between different voices, generations, perspectives, and traditions of thought and action. A global outlook does not mean neglecting the local or national struggles, but the opposite. A well-informed global outlook needs to be fed by analyses of social movements and challenges at the local, national, and regional levels. We seek to shed light on alternative experiments rooted in local realities and struggles that may inspire actors on different continents and show glimpses of possible futures. We want to provide our readers with the keys to understanding a protest wave or a crisis in a place or a country that does not make it to the news headlines but from which we have much to learn. We will also pay attention to how local or national actors connect at a transnational level and may have a global impact. We hope to foster the diffusion of theories, practices, symbols, and repertoires of protest all over the world.

To understand the actors and the challenges of our world, we need to combine scales of action and levels of analysis. A proper global outlook requires multi-sited fieldwork in different regions, fully embedded in simultaneously local, national, regional, and international reality. Social movements are shaped by contexts and actors in all these distinct arenas, but they also contribute to determining the local, national, and global realities. While localised movements are usually reduced to parochial conflicts, move-

ments like the Zapatista uprisings in Mexico – which celebrated its 30th anniversary this year – have shown they also have essential global meanings. With openMovements, we want to understand how struggles and cultures of activism resonate beyond national borders and how transnational networks affect domestic and international politics.

> Public sociology

Social scientists have a specific contribution to make in a democratic public space. *Global Dialogue* and openMovements are meant to be relevant channels for this effort. Scientific rigor and long-term empirical fieldwork are needed to understand the features, stakes, and challenges of struggles as well as the conflicts beyond the immediate events covered by mainstream newspapers. Thus, it is essential to open spaces where scholars who have conducted in-depth research can diffuse their results and perspectives through accessible texts to a broad audience beyond the academy.

With openMovements, we are particularly interested in connecting the sociology of social movements with general sociology, developing approaches that avoid the traps of both "professional" sociologists' hyper-specialization and intellectual vanguards. As former ISA president and *Global Dialogue* founder Michael Burawoy proposes, public sociology endeavours to bring sociology into dialogue with audiences beyond the academy, an open dialogue in which both sides deepen their understanding of public issues.

> A new development of openMovements

OpenMovements was born as an editorial project in March 2015. Founded by us, it was initially published by the leading independent media platform openDemocracy. It aims at "opening social movements" in three ways:
• Connecting the analysis of social movements with broad social change, considering the study of social movements as a critical element for a better understanding of both specific social actors and society as a whole.
• Fostering a global outlook, with particular emphasis on the experiences of the Global South and the ability to generate collective learning through different struggles in the world.
• Opening a space for the dialogue between scholars and activists to contribute to public sociology.

From 2015 to 2021, openMovements has published around 250 articles from activists and scholars from 30 countries as a section of openDemocracy. Thanks to their concise format, well-informed analyses, and a dynamic online publication platform, these articles have reached a broad readership of both researchers from different continents and a wider audience of tens of thousands of readers among citizens, journalists, activists, and policymakers. Some of these articles were written as an intervention in an

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ongoing public debate, but always with an intention to go beyond a mere opinion and to seek rigorous analysis. We were also concerned about including voices usually silenced or poorly represented in public debate and academia.

Some of these articles were published as a part of a series edited by guest editors (on topics such as Crises of Migration, New Repertoire of Repression, Reinventing the Left, or Social Movements in the Pandemic). A selection of articles has been republished in five books in English or Spanish, all in open access: *Protesta e indignación global* (2017); *México en movimientos* (2017); *Alerta global. Políticas, movimientos sociales y futuros en disputa en tiempos de pandemia* (2020); *Social Movements and Politics during COVID-19* (2022); *Chile en Movimientos* (2023).

After this initial stage, openMovements will begin a new phase within *Global Dialogue*, seeking to build bridges, in a more institutionalised way, between the world's leading sociological association and diverse audiences. In this new phase of the project, two new developments have been added to the original spirit. Firstly, we seek to offer a dynamic platform where articles will first be published in English on the *Global Dialogue* website. Part of them will be integrated into one of the three annual issues of the magazine and translated into more than a dozen languages. Secondly, rather than working with a single dissemination platform, we will seek partnerships with digital media worldwide to broadcast its content to a broader audience.

We encourage you to contribute to this new phase of openMovements. While we focus on single articles, we also welcome series edited by guest editors, bringing together contributions by activists and social scientists from different continents on a specific theme. We are particularly open to short texts on recent events and hot topics in world politics that are not mere opinions but the result of research on the subject and on-the-ground monitoring of social and political processes. In other words, we need a public and global sociology on the move to understand and face all the historical challenges we are living through. This is what openMovements has been and aims to continue being. ■

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> How do we Research and Understand Popular Struggles?

by **Laurence Cox**, Maynooth University, Ireland, **Alberto Arribas Lozano**, Universidad Complutense de Madrid, Spain, and **Sutapa Chattopadhyay**, St. Francis Xavier University, Canada

Baiga women and children in protest walk, India, 2003. Credit: Simon Williams, Ekta Parishad / Wikimedia Commons.

The last quarter millennium of world history is also one of social movements: the struggles against empire that produced a world of post-colonial nation states, the battles for democracy now under severe attack in many places, women's and LGBTQ+ movements that have fundamentally challenged patriarchy, migrant and anti-racist activism, dis/ability and mental health struggles, anti-war movements, class-based struggles of many kinds – including democratising access to education and hence research – and so on.

There are good reasons why social movement research flourishes in this situation. But how can we actually do that research well? In co-editing the first movement research methods handbook for a decade (together with Anna Szolucha, currently on fieldwork), we focussed particularly on engaged research, the Global South and care for new researchers.

> Engaged and conventional research

Handbooks of methods are often tools for centring purely academic production. However, social movements have played a crucial role in developing key sociological theories and methodologies (Marxist, feminist, queer or decolonial, for example). Movement research is thus a peculiar field, where practitioners whose organisations often have educational, theoretical and research activities of their own are regularly excluded from discussion, as academics have tried to assert the respectability (suitability for funding and political safety) of their disciplines. In keeping with this situation, previous handbooks have either been purely scientific in tone or have been highly theoretical, presenting radical methods but assuming a prior academic training and context.

We have tried a different approach, inviting authors working within strictly academic contexts to contribute chapters alongside researchers working in movements and those with much experience of collaborative and engaged research methods of various kinds. We feel the result is a much better representation of the actual richness and creativity of movement research, and the commitment of so many researchers to social justice.

We are particularly happy to have a section dedicated to the "applications" of movement research: What do movements do with research, of any kind? All too often, this

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issue has either been ignored or presented as a highly abstract ideal, rather than exploring the practical experiences of movements and engaged researchers over time – which are interesting, challenging and a necessary starting-point for doing better.

> ## Movements of the Global South and North

As with so many other things, writing about how to research movements has been dominated by the Global North – although there are far more, and often much larger, movements in the Global South. Until now, literally every (English-language) handbook in the field has been centred on North America or Western Europe in terms of its authors and topics, despite the long history of researching popular struggles within the "social movements" framework in Latin America, India and South Africa, among others.

We agreed to edit a new handbook (the first general one in a decade) on the condition that we could do it from a more global perspective – although we would not claim to have successfully decolonised it. Even finding independent funding for translation, and working hard on copyediting for non-native English speakers, does not overcome the problems created by the intensifying centrality of English in global academia. At the same time, the continuing inequalities of research funding mean that smaller countries whose movements are often not particularly significant (such as England) occupy a very large bulk in global academic publishing.

We are nonetheless happy to have brought out the first handbook to have authors and themes from all continents (except Antarctica), highlighting movement research in the Global South and Indigenous perspectives alongside others. This is a first step towards a more honest and useful picture of best practices in movement research worldwide.

> ## Supporting new researchers

Lastly, sociologists often don't think enough about how people already in the field can support others to get started, and how this works. In much of Europe, for example, people wanting to do postgraduate research on move-

ments will never have received undergraduate teaching on the difficult challenges of researching movements – and may have to write research or funding proposals without access to university libraries, unless a current grant holder recruits them into a pre-planned project. Thus, there is often little real space for learning about the huge variety of movement research, and a tendency to reproduce whatever newcomers have actually come across. Movement-based researchers without links to strong independent research traditions are even more poorly served.

From this point of view, we are very happy that the publisher is willing to make our substantial (12,000-word long) introduction available free online. We hope this will help democratise access to the full spectrum of possibilities, as well as opening the doors to all the usual ways through which activists, researchers outside universities and students in the Global South gain access to normally paywalled material.

At an even more basic level, we have worked hard with authors to ensure that chapters are accessible to those new to the field – people who have been outside education for decades, those without an elite education, people who are not native English speakers and people whose attention is pulled in many directions by caring responsibilities, political struggle or the pressures of work. Doing good research will always be an effort, but writing on methods should not mean showing off cultural capital in exclusionary ways.

The experience of putting this book together has been an extraordinary and moving one, revealing some of the incredibly creative, thoughtful and committed work being done in so many different movements, geographies and academic spaces. Established academics in the Global North, key figures in the Global South, activist researchers and junior career researchers have all responded with great energy and generosity to the project. We think this collection shows some of the best of the many ways in which research engages with social movements, and we hope it will inspire newcomers in particular to join this ongoing conversation as well as that between scholars. ∎

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> Mayan Video Practices
and the Decentralization of Knowledge

by **Carlos Y. Flores**, Universidad Autónoma del Estado de Morelos, Mexico

Credit: Carlos Flores, 2006.

Since the 1990s I have been working in collaborative video projects with community-based Mayan organizations in Guatemala. When some of these projects started, the country was emerging from a 36-year civil war that ended in 1996 and left nearly 200,000 dead and more than 45,000 disappeared, most of them civilian members of indigenous communities. After such overwhelming effects of armed conflict, Mayan social movements and organizations reemerged to demand rights and justice from a largely non-indigenous state. Video became an important educational tool in some areas not only to reinforce ethnic identity and political claims, but also to counter hegemonic non-indigenous narratives about their lives, politics, and cultural practices.

My role as a visual anthropologist trained in the West was to help structure the narratives of visual materials mainly using the camera work of the people involved in the projects and to discuss with them the crucial editing process from which messages would emerge for diverse publics. First among Maya-Q'eqchi' and later within Maya-K'iche' communities, we produced several documentaries related to cultural practices, memory, and justice for villagers killed during the war, and finally we addressed struggles for legal autonomy and respect for their own forms of law and dispute resolution. What I came to realize from these video experiences with Mayan communities, however, is that such collaborative outputs are far from straightforward and involve complex interac-

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tions and understandings, particularly since our different socioeconomic and cultural backgrounds shape diverse expectations concerning the projects.

> The modern/colonial legacy

There are two fundamental dimensions which, to different degrees, have affected not only my own collaborative work among Mayan organizations, but also the efforts of many researchers working with social movements, particularly in the so-called Global South. These are modernity and colonialism: two sides of the same process of Western expansion, as numerous scholars have observed. On one hand, the modern tradition, following supposedly objective positions based on scientific truth, has tended to develop particular criteria and institutional discourses to construct hegemonic proposals of how to interact with nature and social life; these do not always correspond to the ways people in the field construct their realities. Colonialism, on the other hand, has at the same time engendered an unequal power relationship between subjects in the field and researchers, in addition to naturalizing the existence of a cultural "Other" who is not only different but also lives in separate times and spaces. This separation has frequently functioned to enforce codes of dominance, subjugation, and cultural difference.

Following such logics, global elites formed in traditions of Western liberal/Enlightenment thought have historically established themselves as the normative citizens from whom cultural "Others" have been enunciated and defined. This assigned identity of subalternity (like that of race or gender) has been naturalized and become almost invisible through the imposition of a "universality" supposedly capable of constructing objective realities. Clearly, subjects in the field interacting with researchers in contexts of social inequality have experienced reduced capacity to assert their visions of the ways in which their lives and those of their communities have been conceived from the centers of power.

The collaborative construction of audiovisual materials with Mayan video makers helped me to understand how power relations conceptually define the ways in which things are understood or not understood in any given society, which in turn validates and prioritizes certain forms of knowledge with respect to others. For example, Mayan filmmakers and communal authorities understand Maya K'iche' law practices as part of an integral system based on Mayan values, principles, and worldviews, in contrast to the dominant and frequent media portrayals of indigenous law as "rough justice".

> New approaches

Within this context of epistemic domination, self-reflexive and revisionist perspectives within the social sciences are developing critical and productive perspective on the objectives, aims, and methods of visual research. It is now possible to rethink new forms of relationship and collaboration, which is generating more creative practices and projects in visual research projects in general. The divisions between researchers and cultural "Others" have also been eroded: a growing number of researchers either work in shared projects with the communities they study or maintain different degrees of belonging to those communities. Their practices are influenced by their cultural identification, academic training, and political positioning. This shift entails the promise, not always fulfilled, of less hierarchical and more horizontal interactions between participants in such research projects.

Social science research tends to privilege the written text, which makes research outputs inaccessible to communities with low levels of literacy or familiarity with modernity's dominant tropes and frames. The use of audiovisual resources for social research therefore acquires particular importance in helping to reduce the distance between participants in research projects, since they can facilitate the collaborative construction of research outputs and provide spaces of encounter for the perspectives of people who come from distinct cultural backgrounds and experiences. These kinds of research outputs can circulate more widely among audiences who may have a different relationship with worlds based on the written word. Many collaborative experiences of researchers and local communities using audiovisual media across Africa, Asia and Latin America hold the potential to support social movements better in defending their educational, political, economic, territorial, legal, environmental, and cultural interests and claims.

So, what is at stake is the possibility of structuring and socially validating practices through which alternative epistemologies – in this case, Mayan claims – and collaborative and intertextual video can be articulated. Such ways of understanding reality should not be thought of as radically different or incommensurable with hegemonic norms. Instead, the challenge lies in decentering the validation of knowledge production and of social practices and lifeworlds which exist at the margins of dominant cultures. ∎

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> Israeli-Palestinian Murderous Escalation in Context

by **Lev Grinberg**, Ben-Gurion University of the Negev, Israel, and Dartmouth College, USA

"War has no winners". Credit: Zo Haderech.

Following the slaughter of Israeli civilians, including children and elders, the rape of women, and mutilation and burning of bodies by Hamas on October 7, the public reaction in Israel was "Don't tell me about the context of the occupation and siege of Gaza, forget about critical theories of colonialism and settler colonialism."

A parallel neglect of context took place in reaction to the bombing and killing of thousands of Palestinian civilians, including women and children, by the Israeli military, destroying entire neighborhoods and displacing 1.9 million Palestinians from their homes. The de-contextualization, in this case, was ignoring the massacre of civilians perpetrated by Hamas and Jihadists in the South of Israel or even arguing it didn't happen at all, despite the videos produced by Hamas fighter cameras showing the atrocities, aiming to terrorize Israelis in what I would call ISIS style.

Our moral position must be clear: no context can justify the intentional killing of civilians, which is a war crime.

There is no contradiction, in my view, between a moral attitude and a political one. The theoretical concept of dynamic political spaces, which I developed to analyze the Israeli-Palestinian case, is designed to analyze both political openings and violent options, while taking a clear moral and political stand against violence.

In order to analyze murderous violence, context matters. It matters both for comprehending the dynamics that have led to the present cycle of violence and in an attempt to contain further escalations. Here I will briefly explain how both Israeli and Palestinian political arenas became dominated by religious zealot elites ready to launch a total war until victory. This is the declared goal of both the Hamas leadership and the Israeli government, and is a disaster for both peoples and the region. At the end of this article, I will mention a possible peaceful ending to the present war.

> The theoretical context

In his comparative research of seventeen cases of murderous ethnic cleansing, Michael Mann shows that they

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take place when an ethnic group feels under threat, and involve three political elements: 1) a radical political elite, 2) organized para-military groups, and 3) significant social support. In what conditions do two sides engage in a total war against each other? First, they need to believe they can win, and second, they expect support from external international forces.

Settler colonialism is especially murderous, as seen in the US and Australia. However, the Israeli-Palestinian conflict is much more complex, and is wrongly interpreted as a simple case of settler colonialism. The Israeli case includes both types of colonialism, settler and "classic" colonialism, which includes military and economic domination. It also became a national conflict when Jews escaping from antisemitism in Eastern Europe attempted to build a nation-state in their ancient homeland, and the Palestinian local population resisted their displacement and subjugation. In recent years, both national movements have become dominated by religious zealots.

By merging these analytical tools, we can understand both the context of the present volcanic explosion and the dangerous developments since October 7. Aiming to contain violence and looking for political solutions cannot succeed while ignoring the local complexities of this particular case.

> The international context

The international context is crucial for understanding the strategies of both sides. Clearly, since Israel redeployed the military around Gaza eighteen years ago, the US, European Union, and conservative Arab regimes have tolerated Israeli periodic air bombings in reaction to Hamas attacks as legitimate acts of self-defense, overlooking the context of siege and economic strangulation.

The Abrahamic peace agreements initiated by Donald Trump between Arab states and Israel, ignoring the Palestinian subjugation and oppression, are the relevant context to comprehend the radicalization of the Israeli and Hamas religious zealots: A) Ignoring the Palestinian question encouraged the most extremist and expansionist trends in the Israeli polity, under the delusion that it can continue the Gaza siege forever, and continue the expansion of settlements displacing Palestinians in the West Bank. B) In reaction to the Abrahamic agreements, Hamas relied on Iranian support and attempted to unite the Palestinians and lead them to national armed resistance.

Both processes have culminated in the October 7 massacre perpetrated by Hamas and the violent Israeli response. It is clear now that no one can ignore the Palestinian question and the Gazan despairing situation. Given the absence of legitimate political leadership able to produce peaceful solutions on both sides, the global aspect of the conflict might lead to a more positive and balanced international intervention.

> The local context

The Israeli control system of Palestinians was restructured following the unilateral withdrawal from Gaza in 2005, establishing what was interpreted as "stable tension" with sporadic violent clashes (called "rounds") tolerated by the international community. Palestinians were divided into four political communities under different regimes of domination: Israeli citizens, Jerusalem residents, and the two largest groups under military domination divided between Hamas ruling in the besieged Gaza and the Fatah Palestinian Authority (PA) ruling the cities in the West Bank.

Both Palestinian political elites have administrative duties towards their civil population and are dependent on Israel for economic subsistence and on the military for their movement. There are two main differences between them. On one side, the PA remained committed to the Peace Accords, cooperated with the Israeli security forces, and continued diplomatic efforts to resume peaceful negotiations, constantly losing legitimacy. On the other side, Hamas combined political efforts with armed resistance, improving its military capacities from round to round and gaining popularity. Palestinian citizens were neutralized both in the West Bank and Gaza, dominated by authoritarian elites supported directly or indirectly by the Israeli regime.

The Israeli citizens also became trapped by conservative political elites, who were contemptuous of the divide-and-rule control system, with no need for peaceful visions of the future. Netanyahu prioritized Hamas because he succeeded in gaining popularity in each violent confrontation. Only one Israeli political force has a vision of the future: the Messianic zealots seeking to expand their domination and dismantle both the Palestinian Authority in the West Bank and Hamas rule in Gaza.

In the absence of alternative political visions, the main differences appeared between the military forces ruling the West Bank: on the one hand, the Israeli security elites seeking to maintain cooperation with the PA in controlling the civil population, and on the other hand, the armed zealot Messianic settlers constantly seeking to displace the Palestinians and sabotaging the Israel Defence Forces-PA cooperation.

The Israeli political system became paralyzed during five consecutive elections between 2019 and 2022, in a deadlock between Netanyahu's block with the extremist zealots and the anti-Bibi [Netanyahu] block, which used tribal hostility against him in the absence of an alternative political vision.

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The formation of an extremist coalition in December 2022, the anti-democratic legislation, and the allocation of Ministerial functions to the most extremist leaders of the zealot settlers, Smotrich and Ben Gvir, provoked unprecedented civil mobilizations against the government. The protestors identified with the military elites against the zealot settlers, and entire reservist units organized and declared they would refuse to serve in the military under the extremist government.

Almost all security officials, including the Chief of Staff Halevi and Minister of Security Galant, warned Netanyahu that the internal tensions would encourage Hamas to attack, but he ignored the warnings. Every day since October 8, Netanyahu has been reminded of his negligence, to which he replies that "political issues" must be postponed until the war's end. Evidently, he has no political interest in ending the war, which will lead to an inquiry committee into his negligence, and his political partners have no interest in ending the war given that their goal is to displace the Palestinians and expand the Jewish settlement in the evacuated areas.

> ### How can we stop the war and build an alternative peaceful vision?

The question is, how can we stop the war when extremists rule on both sides and seek the total defeat of the enemy while the moderates on both sides have neither leadership, nor legitimacy, nor alternative peaceful visions?

This is the precise moment for a paradigmatic change in the international attitude towards Israel/Palestine: first, imposing a cease-fire and the exchange of hostages and prisoners; second, achieving a non-belligerence (*Hudna*) agreement and start reconstructing Gaza; and third, starting to build trust in diplomacy and politics by taking into consideration both national expectations: the need for Palestinian independence and the need to appease the existential insecurity of Israel.

In my view, the model of intervention should be the peace agreement in North Ireland mediated by the British and Irish governments. In our case, the brokers should be the US, Egypt, and Saudi Arabia, using power-sharing models beyond the two-state formula. ■

> The Strange Return
of the Interventionist State

by **Paolo Gerbaudo**, Universidad Complutense de Madrid, Spain

Credit: Pixabay.

One of the most surprising political trends of the late 2010s and early 2020s has been the return of state interventionism in the economy. After many decades in which the idea that the state should intervene as little as possible in the economy constituted a bipartisan article of faith, we are witnessing a new acceptance of the need for state power – for good or worse.

Examples of this trend are manifold, and in some cases they are also very conspicuous; yet surprisingly, their implications have not been fully drawn out. While during the golden age of neoliberalism, there was strong consensus on the need to establish a global free market, since the 2008 financial crisis, many countries have erected new tariffs and regulatory barriers. While it was long held that the state should steer clear of interfering in the economy, now governments are overtly engaging in industrial policy, specifically the idea that the government should decide the economic priority of the country, promote technological excellence, and ensure capital is channelled towards strategic sectors. Finally, while for decades politicians progressively decreased public investment, leading to much infrastructure falling into disrepair, now there is a new broad consensus on the need to strengthen public investment, as seen in the investment plans of Next Generation EU or the economic programmes of Bidenomics which aim to accelerate the green and digital transition.

What are we to make of the return of state interventionism which has been described as amounting to a "New Washington Consensus" (in contrast to the neoliberal "Washington Consensus")? Should these political discourse and policy changes be taken as just a tactical perhaps temporary change within neoliberal consensus? Or are they rather glimmers of a more structural and long-term shift in policy? To date, these changes have mostly been seen, especially on the left and among critical political economists, as a limited route correction fundamentally keeping with the overall spirit of neoliberal economics.

In contrast, I contend that these trends constitute the manifestations of a profound transformation of contemporary capitalism and capitalist democracies. The changes signal that the bipartisan agreement on government intervention that dominated the golden era of globalisation has been – at least partly – displaced and that, in this turbulent time, it is widely accepted that more robust state interven-

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tion is necessary. However – and this is crucial – this does not mean that this change and the return of the state are inherently a positive transformation or anything like a shift towards socialism. In fact, as we shall see, in most cases new interventionist policies have been waged in the interest of the wealthy and that of large corporations.

This change of paradigm invites sociologists some assumptions that became dominant in political debates over the last decades. We should re-examine the widely accepted notion that we live in a society dominated by the "free market" in which unrestrained competition and the impersonal mechanisms of the market dominate every corner of our lives. As recent events have shown the market is anything but "free", as it is dominated by power oligopolies often enjoying the support of policy-makers. Furthermore, the very implementation of market mechanisms has been in many respects been a specific form of "state policy", aimed at achieving given political objectives by economic means. Now that such state intervention has become more evident, also, the political character of these mechanisms has become more apparent, and the phantasy of a "free market" becomes more difficult to maintain. The epistemic turn carried by the return of interventionism, namely the way in which it makes more apparent the political character of economic decisions, could have important consequences for political mobilisation, in lessening the ability of power-holders to claim that they are just managing the local consequences of market pressures.

> ## > Beyond the illusion of the "free market"

The neoliberal era, which took root in the 1980s, ostensibly presented itself as the era of "small government" and "free markets": an era in which much of the course of society would be decided by following market principles such as economic competition and the price mechanism. This sociological description captured the most distinctive point of consensus in political ideology, which pivoted on glorifying the market and vilifying the state. Between the 1980s and early 2000s, a broad consensus crystallised on this matter, spanning from "early adopters" among neo-conservatives such as Margaret Thatcher and Ronald Reagan to copycats among Third Way leaders such as Bill Clinton, Tony Blair, and Gerhard Schröder.

Arguing that both centre-left and centre-right politicians were neoliberal, as many critics did at the time, captured a fundamental kernel of truth. Large swathes of the political spectrum, of both the centre-left and the centre-right, bought into the notion that in the "new times" of the "end of history," or the time of "post" (post-modernity, post-ideology, post-class to quote some of the most fashionable expressions) politics, the state as the chief instrument of what was no more, had to retreat. At the same time, free rein had to be given to the "spontaneous" initiative attributed to "society" (or better still, "civil society" to clarify that it was

society beyond the state) and to the market. The discretionary intervention of the state in economic affairs inherited from the Fordist era – its planning apparatus, state ownership, and comprehensive social security – was seen as an impediment to the unfolding of private initiative.

Matters were far more complicated once the observer moved from the pinnacles of the ideological tower down to the more mundane level of policy detail and economic processes. The most consequential implementation of this blueprint consisted of the explosion of economic globalisation. Global trade and investment experienced momentous growth amid the lowering of trade barriers and vanishing capital controls, both manifestations of a "non-interventionist" or "laissez-faire" state. But globalisation was hardly "spontaneous". In every country its unfolding was made possible by politicians making laws, privatising companies, creating free-trade zones, and "consolidating" public finances to make their economies "fit for globalisation".

As globalisation faced a number of successive crises (in finance, climate, and now geopolitics) it soon became apparent that the state neoliberals did not resent the state as a whole, but rather selectively opposed what Poulantzas described as the social and economic apparatuses of the state, those which had grown during the social-democratic era and were responsible for many concrete improvements in the living conditions of the majority of citizens. If anything, the repressive apparatus of the state (the army, the police, the prisons, etc.) grew on and on during the neoliberal era. Besides the most infamous episodes of that time, such as the Pinochet dictatorship in Chile, combining neoliberal economics and the killing of political opponents, we witnessed the rise of a "penal state" as documented by sociologist Loïc Wacquant and rising incarceration rates in countries like the USA. A less "social state" meant a more repressive state.

Regarding economic policy, the state was permanently assigned an ancillary role. State intervention was tightly limited to "regulatory" purposes with a strong suspicion of any proactive economic policy which was seen as engaging in the dangerous task of "picking winners" and "crowding out investors". Yet, as regulation theorists have long argued, even so-called "de-regulation" is a form of regulation, but one that, besides its notable economic effects (commodification, the creation of oligopolies, etc.), also has important ideological ones: making people believe that the economy is not a realm of politics, but a sphere now left to the unfolding of pure market forces. If in history there have always been "markets" – as the Annales School of Economic History has argued – there has hardly ever been such a thing as the "free market". The market is permanently embedded in society, as Polanyi maintained. The return of the visible hand of the state in times of explicit state interventionism provides abundant proof to dispel this pernicious myth.

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> The new planning state and its political implications

Recent crises project a return of what neoliberalism repressed: the interventionist state. The crises experienced since the 2008 financial crisis have seen governments adopt a far more proactive role than we had been accustomed to. One revealing example of major investment plans seen in the USA and the UK is the significant quantity of financial resources committed to them and how they adopt, in their very name, the frame of "plans". Everywhere one looks, plans are mushrooming for climate transition, solar energy, digitalisation, semiconductor research, etc.

These plans, in turn, often pivot on various "missions," using a phraseology popularised by Italian economist Mariana Mazzucato, the theorist of the "entrepreneurial state". This seems to militate against received suspicion towards plans and planning of all sorts, seen as dregs of the failure of a "command economy" and the Soviet economic model. Particularly significant are the major investments in micro-chip technology in the West. Both the USA and the European Union have launched efforts to produce locally microchips whose manufacturing had hitherto been concentrated in South-East Asia. These choices make no sense from a purely economic or market perspective: microchips are produced in Taiwan because it is much cheaper to produce them there. But they respond to other considerations that, while being "anti-economic" in the short term, cannot be ignored, such as considerations of technological supremacy, national security, etc.

This return to public investment and planning projects is significant when seen from some familiar neoliberal nostrums. As Michał Kalecki famously observed, capitalists resent public investment as they think all investment decisions should be their monopoly. Planning and the "planning state" were a traditional target of attacks from neoliberals such as Hayek and von Mises, who saw planning in any way or form as a manifestation of a major form of hubris, marked by the pretence of politicians to decide on things

that only the market should be entitled to choose. Planning was not abolished but transferred by and large from the state to multinational corporations, such as Walmart. However, this does not mean that this return of the "visible hand" of the state is necessarily a positive move.

For example, Bidenomics may have well reassert the strategic importance of public investment, but it contracts out public works, leaving these projects to be carried out by private firms. Further, in the US as in most other countries, there is no talk of the state claiming control of the "commanding heights" of the economy, as was the case with the post-war interventionist state. The battle for recovery of public ownership over strategic firms still lies ahead of us (though in countries like France and Spain, there has been a partial move in this sense). Furthermore, this return of the interventionist state is strongly contested, as seen in the rise of libertarian politician Javier Milei in Argentina on a platform centring precisely on the denunciation of state intervention in the economy. Yet, time and again, politicians as Milei find themselves retreating on their untenable promises to "demolish the state", thus revealing how much the supposed "free market" is far from spontaneous, but always relies on covert state intervention. As it was the case for the neoliberals of old, libertarians as Milei don't really want to "demolish the state", but to delegitimise its democratic use.

If there is a silver lining in the present "neo-statist" conjuncture, it is the fact that now "the king is naked". State involvement in the economy is no longer shrouded in "free-market" illusions, as it was in the recent past, and the state's decisive role in structuring the economy and mitigating its inequalities is out there for everyone to see. This epistemic turn can offer progressive forces new points of pressure and targets for mobilisation, while making citizens more aware that the economy is not a natural or spontaneous phenomenon but is deeply intermingled with political decisions. As the fantasy of a market society fades, the conditions are set to rethink what democratic politics in present circumstances may look like. ■

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> The Authoritarianism
of Meritocracy

by **Fabrício Maciel**, Fluminense Federal University, Brazil

Credit: Freepik.

Meritocracy has always been praised in the modern world as a superior moral system and the most effective for tackling inequality. For its advocates, its great virtue lies precisely in the fact that it opens up real opportunities for everyone to move up the social ladder, thus breaking down the barriers of social injustice imposed by inequality of origin. As a result, all that is needed to build a more egalitarian and inclusive scenario is individual effort combined with the opportunities a meritocratic society offers.

Nothing could be more misleading than this presentation. In theoretical and empirical research that my colleagues and I have been carrying out over the last few years in Brazil, with executives from various levels and sectors working in companies based in Rio de Janeiro, we have observed just the opposite. As well as being fragile and misleading in its most fundamental promises of social ascension, meritocracy is also profoundly authoritarian. What's more, its authoritarianism is implicit and so more invisible and effective than the explicit authoritarianism of today's far-right national governments.

> Social origin, lifestyle, and political positions

Before reaching this conclusion, we structured and developed our research on three basic levels that allowed us to test our initial hypotheses. The first level deals with social origin, which is basically synonymous with class origin. In a sample of some 100 executives (including an online questionnaire and a survey on the LinkedIn social network), we immediately realised that the vast majority (more than 90%) were born into Brazil's upper middle class. In this way, we identified a connection between a privileged class background and occupying highly valued positions in the labour hierarchy. This fact alone belies the initial claims made in favour of meritocracy. It shows that rather than being democratic, meritocracy is arbitrary in its implicit dynamic of reproducing the privileged conditions of the middle and upper classes. Wright Mills reached similar conclusions in his brilliant study of elites in the United States in the 1950s.

The second level of our research dealt with the lifestyle of Brazilian executives. In this respect, we surveyed their reading habits and found that the magazines *Você S/A, Forbes Brazil* and *Exame* are among the favourites of this audience. After subscribing to and analysing these magazines for three years, we found that the material systematically constructs and defends what we define as a "market mentality", which is deeply meritocratic, conservative and authoritarian. In a profound way, the consistent defence of the atomised individual and individual freedom, above anything else, ends up stimulating the development of author-

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itarian personalities. This happens because the celebrated self-confidence of market winners, crystallised in the life stories of celebrity executives and entrepreneurs, hides the social origins and privileged trajectories of these individuals who have everything but the merit of having conquered the positions of prestige and power they occupy. Nothing is more authoritarian than this. It is a subtle and effective form of market authoritarianism.

Finally, the third axis of our research concerned the political leanings of our interviewees. In this dimension, what the market winners think becomes clear, naturally reflecting who they are. When asked about central issues facing Brazilian society and the world today, such as labour and pension reforms, the causes of inequality, and the role of companies in society, among others, the vast majority of respondents presented a ornate discourse that was very much in tune with the corporate world. In short, this discourse heralds the market as the realm of all virtues and portrays the state as the guilty villain, responsible for all social problems. This leaves citizens, helpless victims of the state, with no choice but to turn to the Market God for help with their vital needs.

> Authoritarian mentality

The relationship between this "conservative spirit", as Wright Mills would say, and the current scenario of the return and strengthening of the extreme right on a global scale is evident. This authoritarian mentality – which is also racist, as we identified in various aspects of our research – combined with the "corporate habitus" prevalent among top executives and businesspeople were fundamental, for example, to the election of Jair Bolsonaro in 2018 in Brazil. His election and support for Bolsonarism more generally relied on intense activism by a large part of the Brazilian business community and abundant financial support. The famous image of Luciano Hang, president of Havan and a well-known Bolsonaro election campaigner, whose symbolic trademark is a green suit with a yellow tie in which he has often appeared alongside Bolsonaro, is a perfect caricature of what much of the Brazilian business class has become in recent years.

It is no coincidence that in 2018 when we administered a large part of the survey questionnaires, the public figure most admired by executives was Judge Sérgio Moro, the then hero of the *Lava Jato* operation and responsible for the arrest of Luiz Inácio Lula da Silva, without which Bolsonaro would not have been elected. Neither was it a coincidence that Moro became Bolsonaro's minister of Justice and one of the most essential symbolic figures of the Brazilian far

right. This is mainly due to the prevailing punitive imaginary in Brazilian society, which intensifies in contexts of social upheaval, usually marked by rising inequality.

In addition, leading figures on the Brazilian and Latin American business scene, such as Marcelo Odebrecht, have always been revered as great leaders and men of integrity: genuine examples of professionals and people to follow. The arrest of Marcelo, then president of the Odebrecht family empire, after being accused in one of the most significant recent corruption scandals in Latin America caused astonishment and consternation among company employees, thus destroying his image as the good family man. This is just one major case among many others.

Figures like Jorge Paulo Lehmann, identified several times by the *Forbes Brazil* ranking as the richest man in Brazil, have always been praised in our imaginary as embodiments of success and honesty to be emulated. The recent scandal involving the loss of Lojas Americanas, with Lehmann and his two partners, Marcel Telles and Beto Sicupira, as the protagonists and alleged masterminds of one of the biggest fraud schemes in capitalism today, also calls these images of success into question. In our research published elsewhere, we dedicated part of our work to investigating the critical biographies of some Brazilian business celebrities. In addition to those mentioned here, we analysed the trajectories of Eike Batista and Abílio Diniz, two celebrity entrepreneurs on the Brazilian scene. As a common finding, we identified that behind their celebrated trajectories of success, portrayed on countless covers of magazines advocating the market, there are highly privileged class origins, which go a long way to explaining their "success".

> Trajectories of privilege
and the meritocratic fiction

From our research, we can say that Brazilian executives, who largely reflect a global reality, are representative of a world where a true "meritocratic fiction" denies the real reasons for inequality. In general, in contrast to the inclusive, tolerant and sustainable discourse supported by "new capitalism", what we find in practice is an environmentally predatory, non-inclusive and intolerant capitalism. For example, some façade inclusion programmes for black people that we found in our research, as well as environmental crimes such as those committed in Mariana and Brumadinho, clearly attest to this. In this sense, some of our top executives would have much to answer for to Brazilian society. ■

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> Forensic Colonialism

by **Mark Munsterhjelm**, University of Windsor, Canada

Critical scholars like Troy Duster, Duana Fullwiley and Amade M'charek have demonstrated that racial concepts have pervaded forensic genetics research, development, and implementation. Adding to these debates, my new book *Forensic Colonialism: Genetics and the Capture of Indigenous Peoples* (McGill-Queens 2023) shows how influential scientists, first in the USA, then in the European Union and China, have variously used Indigenous peoples as resources and targets of new technologies such as ancestry inference and phenotype (visible appearance) inference, particularly the Uyghurs in Xinjiang. The scientific assemblages (networks) of scientists, universities, security agencies and private companies that are involved are organized mainly through shared narratives about how to hunt criminals and terrorists more effectively in the name of The People and/or Humanity.

A central case study involves how Kenneth Kidd of Yale University has used the Karitiana and Surui of western Brazil and other Indigenous peoples as what he repeatedly terms "resources" for over 30 years. In response to near genocides during Brazilian settler colonization, these peoples adopted close intermarriage to recover their numbers and are genetically interrelated. They were controversially sampled in 1987. In the early 1990s, during the "DNA Wars," heated public debates between leading genetic researchers like Richard Lewontin and Kenneth Kidd took place over the introduction of forensic genetic testing as evidence in US and Canadian courts. During a 1990 Hells Angels murder case in Ohio, defence lawyers gained access to Kenneth Kidd's data on the Karitiana and Surui; they and other defence lawyers, including those for a Canadian serial killer, then tried to use it to raise doubts about prosecution genetic random match probabilities that linked defendants to crime scenes. Prominent scientists argued in court testimony, conferences, scientific journal articles, and the US mass media over the significance of the data related to Karitiana and Surui Indigenous peoples and whether or not it meant there might be differences in genetic marker frequencies in racially defined populations in North America.
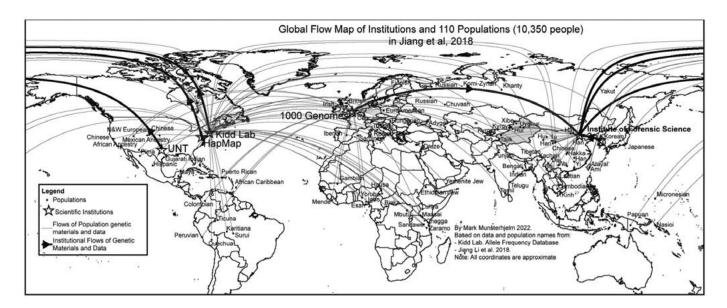
> Post-9/11 expansion

Since the 9/11 attacks, the rapid growth in security spending in the US, the European Union, and China has driven the expansion of forensic genetics, including the development of ancestry inference and phenotype (visible appearance) inference. Before the attacks, research into ancestry and phenotype was considered prohibitively racially controversial. In 2003-4, citing problems with efforts to identify 9/11 victims, the US Department of Justice (DOJ) began extensive funding for ancestry and phenotype as "alternative genetic markers". The Kidd Lab received US$8.5 million of this funding to develop ancestry inference and individual identification SNP (single nucleotide polymorphism) marker panels. This included Kidd and his colleagues stating in a 2011 DOJ funding report that they used the Karitiana and Surui, as well as other Indigenous peoples like Mbuti and Nasioi, as examples of genetic differences to improve the robustness and generalizability of the technologies: "We have deliberately included several small isolated and inbred populations from different geographic regions in our studies."

By 2015, the marker panels were included in US-made commercial forensic genetic analysis systems. These commercial systems were tested on Indigenous subjects like the Illumina FGx tested on Yavapai Indigenous people of Arizona USA, sampled before the early 1990s. Chinese security agencies tested the Thermo Fisher Ion Torrent system on Uyghurs, and some results were presented at ThermoFisher conferences in 2016 and 2017 during the Chinese government's increasing repression in Xinjiang.

After 9/11, through replacing old labels like "counterrevolutionary", the Chinese government adopted the global war on terror rhetoric, casting China as a victim of Islamic terrorism during the escalating settler colonization of the strategically important Xinjiang Uyghur Autonomous Region. Reflecting escalating repression in the early 2010s, the Chinese Ministry of Public Security Institute of Forensic Science cooperated with Kenneth Kidd to develop its ancestry inference SNP marker panels that sought to differentiate between Han Chinese, Tibetans, and Uyghurs. This cooperation allowed Kidd to test his panel of 55 ancestry markers on Chinese subjects in 2015. In return, he provided DNA extract samples grown from cell lines in the Kidd Lab, eventually totalling 2266 samples representing 46 populations (including the Karitiana and Surui). The Institute of Forensic Science use these in developing their own ancestry inference SNP markers, like a 2018 paper by Jiang et al. that used 10,350 samples representing 110 populations, including 957 Uyghurs (a major oversampling). Since the early 2010s, the Institute of Forensic Science has received 8 Chinese patents (and three applications) concerning ancestry inference markers, with some directly targeting Uyghurs and/or Tibetans (e.g. CN103146820B and CN107419017B).

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Global Flow Map of Institutions and 110 Populations (10,350 people) in Jiang et al, 2018

Kidd Lab's contribution of 2266 DNA extract samples representing 46 populations greatly extended the global scope of the Institute of Forensic Science scientists to test their 27 ancestry inference marker panel in Jiang Li et al. (2018). Credit: Munsterhjelm, 2022.

This growing security focus on Uyghurs was also reflected in the Institute of Forensic Science's joint research with the Beijing Institute of Genomics and the Chinese Academy of Sciences-Max Planck Society Partner Institute of Computational Biology in Shanghai to develop phenotyping technologies targeting Uyghurs in a series of studies involving hundreds of Uyghur subjects published between 2017 and 2019. Scientists from the Beijing Institute of Genomics and the Partner Institute of Computational Biology in turn cooperated with the Visible Genetic Traits Consortium, which involved large numbers of European (e.g. TwinsUK), Australian and Latin American subjects. One 2018 article by Liu et al. included nearly 29,000 subjects, including some 700 Uyghurs.

The above research assemblages have been partially disrupted. Since 2017, there has been increasing international condemnation of China's crimes against humanity in Xinjiang, including mass incarceration in reeducation camps, repression of religion, culture, and language, and mass biometric and genetic profiling. This growing condemnation finally disrupted genetic research when it was the subject of international coverage in Human Rights Watch reports and Western media outlets. In 2019, Thermo Fisher announced it would stop selling human identification products in Xinjiang. In 2020, reflecting growing US–China tensions, the US Department of Commerce imposed sanctions on the Institute of Forensic Science, which the Chinese government has protested against as interference in its internal affairs and a weakening of global cooperation against terrorism. The reactions of some Western and Chinese scientists who are involved have included dissociating themselves from further research and denials of wrongdoing.

These influential forensic genetic assemblages have been involved in mass violations of rights, including routine unauthorized secondary usage of samples taken decades ago, which violates contemporary ethical norms and Indigenous sovereignty and rights (e.g. Article 31 of the UN Declaration of the Rights of Indigenous Peoples). The failures to limit research on vulnerable populations have been exemplified in scientific cooperation with Chinese state security agencies on Uyghurs and other Xinjiang peoples. In conclusion, the pervasiveness of racially configured concepts and hierarchies in forensic genetics requires further inquiry and public debate. ■

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> Diversity and Transparency

Within (and Beyond) UN Bodies

by **Vitória Gonzalez**, Plataforma CIPÓ, and Assistant Editor of *Global Dialogue*, Brazil

Monument entitled 'Turn off the plastics tap' by Canadian activist and artist Benjamin von Wong stands outside the venue for the UN Environment Assembly taking place in Nairobi, Kenya. Credit: UNEP/Cyril Villemain.

Diversity needs to be reflected in leadership positions – in the public sphere, both in domestic politics and in international organizations such as the United Nations (UN), as well as in the private sphere. The diversity of experiences, perspectives, and life stories in decision-making spaces leads to more inclusive and comprehensive discussions and policies. That is, the representativeness of individuals from minoritized groups matters and is a crucial element for democracy. Their being representative ensures access to decision-making spaces for numerically majority groups who are silenced and socially discriminated against, enabling the circulation of their ideas and interests.

This relationship between the political representation of different social groups and democracy occurs because political power is not only symbolic, granting social legitimacy. It also has a material dimension, since it allows access to power and resources, thus affecting society in concrete ways. That is why the possibility of being chosen for high-level positions and having effective access to resources must be shared by people with different social markers, and this is directly related to the idea of social justice.

When international policy-making is predominantly guided by the decisions of white men from the Global North, it tends not only to exclude interests, experiences, and perspectives of minoritized groups, but also to universalize the experiences and perspectives of the former. It is therefore essential to emphasize that having greater diversity in leadership positions within organizations such as the UN, besides being a symbolically charged matter of democracy and justice, is a technical issue, in the sense that it can improve policy outcomes by providing innovative grassroots perspectives for contemporary global debates and challenges.

If we consider agendas related to the environment and development, which are critical for the entire world, but especially for the Global South, improving representation is imperative. Global South countries face disproportionate impacts of climate change and challenges related to poverty and inequalities, both within their national borders and in comparison with the Global North. Vulnerabilities, scarce resources, and dependence on climate-sensitive sectors are some of the themes to consider here.

> Underrepresentation within the UN system

Considering the UN system, there is underrepresentation of various groups, mainly in senior leadership positions, and the layers of underrepresentation overlap if we think intersectionally. In particular, the underrepresentation of women and individuals from the Global South stands out. This is a problem to be addressed seriously and promptly by the different bodies

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that form the organization. In this context, it is worth noting that locating official data and information regarding candidate selection, appointments, and mandate details is not an easy task. This difficulty hinders public scrutiny – and transparency is also a fundamental question for democracy.

Given this information deficit, recent research conducted by the Group of Women Leaders Voices for Change and Inclusion (GWL Voices) regarding gender issues is extremely valuable. The study indicates that, since 1945, within 33 of the world's most important multilateral organizations, there have been 47 women and 335 men in leadership positions. Among the institutions analyzed, five have been led by women only once, and 13 have never been led by women, including the UN General Secretariat. In addition to quantitative analysis, it is important to think qualitatively; for example, women should not only be appointed to positions related to gender issues or themes historically linked to them, such as childhood and care.

Concerning nationality, an article published by PassBlue highlights, for instance, how the senior leadership positions of five key bodies in the UN (the Department of Political and Peacebuilding Affairs, the Department of Economic and Social Affairs, the Office for the Coordination of Humanitarian Affairs, the Office of Counter-Terrorism, and the Department of Peace Operations) are occupied by the five permanent members of the Security Council. This creates and deepens a monopoly and reinforces different power imbalances.

A recently published policy brief by Blue Smoke, "Unveiling Inequalities: A spotlight on senior appointment at key UN environment and development bodies",[1] highlights the lack of transparency and diversity in senior leadership appointments within four UN entities: the United Nations Development Programme (UNDP), the United Nations Environment Programme (UNEP), the Food and Agricultural Organization (FAO), and the Convention on Biological Diversity (CBD). These four bodies are crucial for environment and development issues, particularly when we think about the climate emergency. Since Global South populations are disproportionately affected by climate change, and this is especially true for women and girls, it is imperative to think about the degree of region and gender representation within these entities. The brief also highlights the fact that across these four bodies, only 20% of senior leaders have been women and on average 40% have been from the Global South.

Since 1966, UNDP has had nine administrators. Among them, only one has been a woman, and only one has been from the Global South. Since 1972, UNEP has had eight executive directors: three out of eight, women; two out of eight, from the Global South. FAO, in turn, has had nine directors general since 1945; although five of them have been from Global South countries, none of them have been women. Finally, CBD has had seven executive secretaries since 1993; six of them have been from the Global South and three have been women. Therefore, the imbalance is constant, revealing different power mechanisms.

> ### Representativeness: a key to facing up to the challenges of our times

The power imbalance in representation and representativeness is, therefore, a constant concern. It is a matter that can be extrapolated from these four study cases and includes social markers other than gender and geographic origin, such as race and religion. Thus, it is an issue that needs to be made more visible. In this sense, the selection processes for senior leadership positions within the UN (as well as its staff as a whole) need to be more transparent, equitable, and democratic; the appointments for these positions should be based more on candidates' life experiences and technical capacities than on personal connections or political bargains. Especially regarding the climate emergency, guaranteeing more representativeness is crucial to face up to the challenges related to the environment and development.
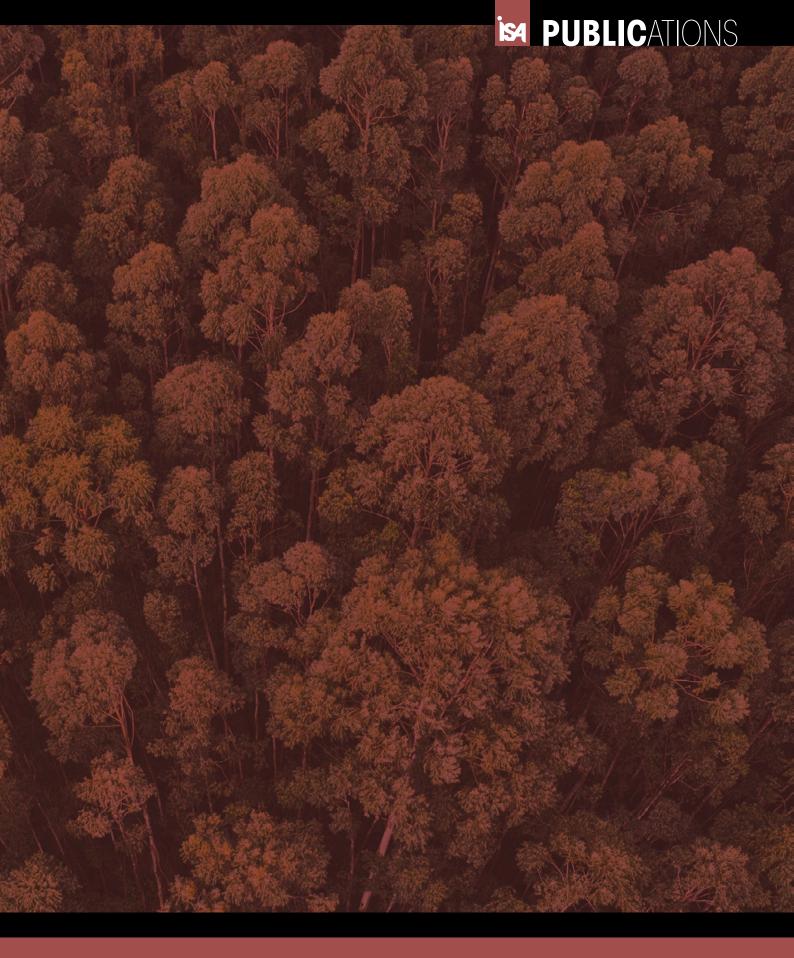
To formulate different global mechanisms that are sensitive to local particularities and able to reach and address the needs of populations in the most vulnerable territories, it is crucial that those same populations be represented in policy-making. By embracing diversity in leadership, we contribute to the democratization of these decision-making processes and to enhancing the overall effectiveness of climate action. Local ecological knowledge and technologies constitute an example of where such efforts can be enacted; projects to generate citizen data that allow for people with different backgrounds and worldviews to be considered and influence research and policy design, are another.

Focusing on transparent and democratic appointments and trying to achieve more equal representation in leadership positions, considering gender, geographic origin, race, and ethnicity, together with other social markers, are urgent matters when it comes to democratizing the global public agenda, providing greater legitimacy, credibility, and social trust to these positions, and strengthening the capacity of the institutions within and beyond the UN. As we argue, it is not only a question of democracy and a symbolic question, but one of justice and technical improvement. In the case of the UN, for an organization whose objectives are peacebuilding, protecting human rights, sustainable development promotion, and engagement in international cooperation, and considering we are facing a climate emergency that affects the entire globe, albeit unevenly, these challenges are imperative and must be faced by moving beyond rhetoric.

It is essential to emphasize that imperative challenges which have been on the agenda for years and years still remain critical. Not all solutions, for sure, will come from international organizations or governments, but they are a constitutive part of our world. How much longer will they fail to represent *we, the peoples*? ■

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