

GLOBAL DIALOGUE

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3 issues a year in 17 languages

New Directions for Global Sociology

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Projekt Klassenanalyse

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> Editorial

At the XIX ISA World Congress of Sociology in Toronto, Canada, this past July, Sari Hanafi was elected as the new President of the International Sociological Association. This first 2019 issue of *Global Dialogue* opens with Hanafi's theoretical vision for the ISA in the course of his term. Here he argues for combining postcolonial and post-authoritarian approaches to lead a conversation around a new paradigm for pluralism in this age of multiple modernities.

Along with the rise of right-wing populist parties across the globe, sociological debates on class have gained new prominence. The first symposium of this issue reflects this newfound interest in questions of class formation and class relations around the world with contributions examining current research in Latin America, the United States, Germany, and Southeast Asia. In conjunction with this research, the symposium explores the implications for the rise of poverty and inequality.

For decades, generating economic growth has been at the center of most economic activity as well as of policy initiatives and scholarly discussions. Over the last years, a growing number of activists, but also sociologists and economists have started an impressive debate on the limits of growth. They discuss the future, and in some regions the possible end, of permanently high growth rates as well as the ecologically and socially destructive effects of this one-sided focus on GDP growth. Both scholarly and activ-

ist debates also examine possible alternatives, and most prominently the idea of "degrowth," a concept that has not remained unchallenged. The texts of the second symposium reflect the discussions surrounding the future of growth and a possible degrowth alternative.

Considering the contemporary global conjuncture, Ariel Salleh argues in her theoretical contribution for a new sociological class analysis that unites mothers, peasants, and gatherers in regard of their material skills in enabling life-on-Earth. With a historical reflection on the debates surrounding ecofeminism, she calls for a critical sociology and the notion of an embodied materialism.

The end of many of Latin America's leftist governments coincides with the rise of right-wing, sometimes authoritarian governments in many other regions of the world. Here scholars from Brazil, Colombia, Turkey, and Poland examine the historical and political developments of right-wing populism.

Three articles are included in this issue's Open Section: Johann Bacher, Julia Hofmann, and Georg Hubmann present the recently published doctoral thesis of Marie Jahoda and remind us what we, as social scientists and politically engaged citizens can learn from her life and work. Elísio Estanque and António Casimiro Ferreira give us an insight into Portugal's new political-labor configuration under the most recent post-Troika period, while *Global Dialogue's* Bengali Team introduce themselves and their work. ■

Brigitte Aulenbacher and **Klaus Dörre**,
editors of *Global Dialogue*

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In his programmatic article **Sari Hanafi**, the new ISA President discusses his vision for the ISA for the years to come. He calls for a paradigm of pluralism to strengthen a global “Sociology in Dialogue.”



Economic growth constitutes the basis of prosperity in western societies but the ever-growing output of goods exacerbates the ecological destruction of the planet. Here contributors from around the globe discuss the role of economic growth in society, its problems and challenges as well as alternative visions beyond this paradigm.



The end of many of Latin America's leftist governments coincides with the rise of right-wing governments, often with authoritarian and populist tendencies in many other regions of the world. In this section, scholars from Brazil, Colombia, Turkey, and Poland examine the historical and political developments of **right-wing populism**.



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“It is very important that some concepts in sociology claim universality, like human rights, but I see their universality as possible only through an overlapping cross-cultural consensus, and not by universalizing values coming from a Euro-American context”

Sari Hanafi

> Global Sociology: Toward New Directions

by **Sari Hanafi**, American University of Beirut, Lebanon, and President of the International Sociological Association (2018-2022)



Sari Hanafi, President of the International Sociological Association.

France, and worked in different academic institutions in Egypt, Palestine, France, and Lebanon. I have thus been surrounded by the myriad debates in these settings.

Because I am wary (very wary indeed) of antagonistic binary categories (such as tradition/modernity, East/West, universalism/contextualism, etc.), I propose various sociologies to always be in dialogue. *Sociologies in Dialogue* was in fact the title of the Fourth ISA Conference of the Council of National Associations, and is the forthcoming volume co-edited by Chin-Chun Yi and myself, to be published by SAGE. It is very important that some concepts in sociology claim universality, like human rights, but I see their universality as possible only through an overlapping cross-cultural consensus, and not by universalizing values coming from a Euro-American context. Let me bring an example of the concept of democracy. Is democracy universal? Yes, it is, but nor as a model to be exported, to echo Florent Guénard (2016), neither as a concept with *telos*, but as a historical experience that got its normativity from its spreading, especially since the 1980s in Latin America, then Eastern and Central Europe, and finally some countries of the Arab world. What is universal is, thus, an imaginary of desire for the democracy whose traces are in the slogans about liberty, justice, and dignity raised by demonstrators. This normative universalism is light and does not preclude the existence of what Armando Salvatore described in 2016 as “different patterns of civility.”

However, as we don’t want to frame this debate as only about emancipation from the colonial condition and western knowledge production hegemony, the postcolonial approach is not sufficient to account for the problems of knowledge production. It should be supplemented by what I call a “post-authoritarian approach.” This means considering not only the impact of colonialism, but also the impact of local authoritarianism.

I was honored to be elected as the President of the International Sociological Association (ISA) during its congress in July 2018 in Toronto. In the following paragraphs I would like to outline the program that I introduced in my speech as a candidate for this position, and to highlight a three-point agenda concerning sociologies in dialogue, moving towards a post-authoritarian approach, and the current crisis in secularization theory.

> Sociologies in dialogue

Among the twenty elected ISA Presidents, only two had come from outside Europe and North America, and I am the third. I come with specific sensitivities to sociology, influenced by my personal and professional trajectory as someone who did his university studies in Syria and then

> Towards a post-authoritarian approach

One cannot but acknowledge the scars of the colonial era. They are still present; they cripple some, and remind others of roads we dare not tread again. But postcolonial studies, which put so much emphasis on external factors and neglect local ones, can be both used and abused. The lexical kinship of *post-authoritarian studies* with post-colonialism means that the former could, by association, draw on a number of assumptions underpinning the latter category, especially in terms of power structures. However, this does not mean we have come to terms with authoritarianism, nor are we “post” this era.

Authoritarianism, in our conceptualization, is not simply the tendency of states to act undemocratically by deploying bureaucratic and police compulsion in social life. In this more descriptive rendering, all states are in some degree authoritarian. It is not the state where the sovereign deploys Carl Schmitt’s state of exception. We know that all states contain “moments” or tendencies of exception and authoritarian practice. Authoritarianism is rather the *systematic removal of popular accountability or participation in the decisions of the state and a substantial centralization of executive power in a bureaucracy* as Graham Harrison stated in 2018.

There are different levels of authoritarianism: one relates to a regime; another relates to a political-economic system; and a third is at the level of the individual.

> Brutalizing authoritarianism

Norbert Elias’ major idea in his famous *The Civilizing Process* is that societies evolve through a movement of regression of individual violence (the pacification of behaviors). However, we are witness these days to what Josepha Laroche called in 2017 “the return of the repressed” or what George Mosse coined in 1991 “brutalization,” to highlight the erosion of this civilizational movement. If state actors are the major players in the brutalization of society through the police and army apparatus, we also witness the increasing power of non-state actors. An example for me, as someone who has lived in Syria and Lebanon, is ISIS and other sectarian and interstitial actors that circumvent the state by deploying community solidarity. But one should also think of global non-state actors such as multinational companies, and financial markets that constitute what James Rosenau called in 1990 “sovereign-free actors”. However, non-state actors rarely operate without the consent and facilitation of state actors. ISIS would not be possible without the total closure of the political space by the Syrian ruling elite, or the highly sectarian Iraqi regime. State and non-state actors not only brutalize society, they also herald the brutalization of the world, of which today we are the witnesses and stakeholders. Worse, as in Syria, Libya, and Yemen, war causes

a “brutalization of politics,” which means that politics becomes difficult without violence.

According to Laroche, this process of brutalization starts with the destruction of social ties and solidarity, leading to the othering and exclusion of groups like poor people and foreigners from the national community and enabling an everyday barbarism against them that eventually becomes generalized across society.

> Neoliberal authoritarianism

The interaction of the economic and the political leads to the emergence of a peculiar politico-economic configuration that I term neoliberal authoritarianism. However, this new configuration is not merely a combinatory outcome, but rather the result of an articulation that in many respects alters both neoliberalism and authoritarian rule.

We know that neoliberalism has generated widespread social and economic injustice and impoverishment. However, what is quite new is the systematic and purposeful deployment of the state’s centralized and coercive power to generate capitalist transformation in societies in which a capitalist class is weak and not dominant. If classical capitalist society often generated a system of domination through a democratic political regime, this is not the case in many peripheral societies, and in Western ones where the capitalist class has become thinner and more heavily contested. The relation of social forces underpinning the state is not only shaped by class, as Nicos Poulantzas argued, but includes racial and gendered hierarchies shaped by processes of what Aníbal Quijano called the coloniality of power, articulated in different ways in time and space.

> Authoritarian citizens

As a political system deployed by state actors and non-state actors, authoritarianism exists in correlation with authoritarian citizens. Authoritarian leaders stifle the imagination: they seek gray automatons that follow their commands rather than autonomous subjects with independent personalities. The mechanism of becoming an authoritarian citizen is not only pushed from above, but is produced in relationship to practical reasoning.

According to Maeve Cooke there are two interrelated components of authoritarian practical reasoning. First, there are authoritarian conceptions of knowledge. These restrict access to knowledge to a privileged group of people and assert a standpoint removed from the influences of history and context that guarantees the unconditional validity of claims to truth and rightness. Second, there are authoritarian conceptions of justification, which split off the validity of propositions and norms from the reasoning of the human subjects for whom they are proclaimed to be valid.

Some people, particularly the religious, or those who share one of these two components of authoritarian practical reasoning, are difficult to argue with in the public sphere. As the notion of citizen entails the political autonomy of each person, Maeve Cooke argues that citizens should have ethical autonomy. This autonomy rests on the intuition that the freedom of human beings consists of, by and large, the freedom to form and pursue their conceptions of the good on the basis of reasons that they are able to call their own. In the processes of revolution and counter-revolution in the Arab world, and in debates identifying democratic forces, attention is rarely given to the elite's practical reasoning, with the emphasis almost exclusively being on the secularization paradigm. Secular forces were seen as systematically immune to the authoritarian practical reasoning while the political Islamic movements by definition operate with such reasoning. Of course this is simplistic, and needs to be scrutinized, as authoritarian citizens can be found among both these elite formations. This leads me to argue that secularization theory is in real crisis, and cannot account for the transformation of citizens' relationships with religion.

> Crisis in secularization theory

While secularization is still a very important pathway toward democracy and modernity, this process needs to be problematized on a post-secular basis in order to free it from some of its excesses and pathologies. In a recent conversation with Jim Spickard, President of ISA's Research Committee on the Sociology of Religion (RC22), he admitted that sociology has historically embraced secularization theory, which sociologists such as David Martin, Manuel Vásquez, and himself have traced to the intellectual battle that early sociologists waged against reactionary religion in late nineteenth- and early twentieth-century France. For Peter Berger, this theory, which saw modernity as leading to a decline of religion, has been empirically falsified, and should be replaced by a nuanced theory of pluralism. The evolutionism that typified religion as "past" and sociology as "future" embedded the secularization thesis into our thinking. As a result, religion's public revival in the 1980s and 1990s was quickly typified as "fundamentalist" and as "a reaction against modernity." This evolving debate, according to Ulrike Popp-Baier, has been framed by three ideal typical meta-narratives. The first is a narrative of *decline* of religious affiliations, practices, and beliefs due to the dissemination of a scientific worldview. The second is a narrative of *transformation*, with arguments about "invisible religion," "implicit religion," "believing without belonging," "vicarious religion," "judicialization of religion," and, in recent years increasingly prominently, "spirituality," suggesting a metamorphosis of the social form of religion in the context of more general cultural and societal changes relating to individualization and subjectivization. The third is a narrative of rise, linking religious vitality to religious pluralism and a market of competing religious organiza-

tions; in the case of Islam, this rise is associated with radicalism, and even terrorism.

We need to go beyond the many clichés labeling some geographical regions as religious or secular to analyze the different intellectual traditions, popular religions, and institutional carriers that have produced the different forms of religion and religiosity in contemporary society. In sociological debate, it is important to discuss the place of religion in democracy and in the public sphere. Citizens cannot be asked to have a moral responsibility to justify their political convictions independently of their religious ones, as John Rawls does. Even within Habermas' conception of pluralism, Rawls acknowledges the place of religion in the public sphere, and argues that religious communities must engage in hermeneutical self-reflection in order to develop an epistemic stance toward the claims of other religions and worldviews, toward secular knowledge, especially scientific expertise, and toward the priority of secular reasons in the political arena. But is it indeed possible to disentangle "religious" reasons from "secular" ones? Scholars such as Darren Walhof (2013) point out that "theology, politics and the identity of a religious community are all tied up with each other, as religious leaders and citizens apply and reformulate their theologies in new political contexts."

However, the confluence of law, religion, politics, and society has had some problematic outcomes, such as sectarianism. In conflict-ridden areas, such as the Middle East, sectarianism is one of the major conflict dynamics, but is also a mechanism for shaping local identity through what Azmi Bishara called in 2017 "imagined sects." By the same logic, Israel recently passed a law that proclaims that Jews have a unique right to national self-determination, while continuing its apartheid politics inside Israel and in the Palestinian territories.

> Conclusion

With the surge of "illiberal democracies" and the assault of some well-founded democracies on civil rights and liberties, the ISA should capture the fears and feelings of so many people around the globe today. Hannah Arendt located the origin of totalitarianism in a combination of external factors (imperialism, crisis of multinational empires) and internal ones (anti-Semitism and racism). In the same vein, I believe the ISA needs to combine the analysis of colonialism and authoritarianism. It should lead a conversation around a new paradigm for religion and pluralism in an age of multiple modernities. This is only possible by constructing a more appropriate framework for understanding the mix of micro and macro dimensions that characterizes the global situation today, and by constructing, as in the title of Alatas' and Sinha's 2017 book, "sociological theory beyond the canon." ■

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> For a Global Dialogue on Class

by **Projekt Klassenanalyse Jena (PKJ)**, University of Jena, Germany

> Why we need class theory– PKJ looking for companions

We are currently confronted with intensifying social inequalities and increasing social protests around the globe, while the global economy is still prone to crisis. This applies even to the capitalist centers. According to official statistics, 19% of the German population was threatened by poverty or social exclusion in 2017; other studies also show an increasing social polarization. Meanwhile, large parts of the world are experiencing a shift to the political right. In light of these trends, we see that the term “class,” which – at least in Germany – was almost completely absent from the public debate in recent decades, is slowly returning to academic and political discourse. The “Projekt Klassenanalyse Jena” (Project Class Analysis Jena) was started recently at the Friedrich Schiller University, Jena. We want to reprocess past discussions concerning class, contribute to contemporary class theory, and provide a forum for discussion of current class politics. In this, we would like to initiate a conversation with academics and activists from all over the globe.

> Why talk about “class”?

The strength of sociological concepts of class is that they analytically focus on the inner linkages between economic, political, and cultural inequalities. The critical capacity of the term “class” in the Marxian tradition is that it reveals structures of power and control rooted in the economic division of labor and its ownership structures. To Marx, class is hence a relational category: the class of wage-earning employees stands in an antagonistic and conflictive relationship to the class of capitalists. Unlike “milieu” or stratification approaches (upper class, middle class, working class, etc.), the term “class” in the Marxian tradition describes a structural connection that can relate the working and living conditions of social groups to each other instead of just describing economic inequalities. Through concepts of “exploitation” (Marx), “social closure” (Weber), “distinction” (Bourdieu), and “bureaucratic control” (Wright), the term “class” predominantly refers to vertical relationships of inequality, and, if pointing to power relations, is equally a concept of social theory as well as a political term. It

includes political hegemony and representation as well as questions of narrative prerogatives in the cultural and intellectual processing of class relations.

> New challenges

Considering new challenges and dynamic and disruptive social change, a contemporary class theory will need to address the following crucial topics and issues:

Class fragmentation and the crisis of political representation

The lasting marks neoliberalism has left on the living conditions of populations around the globe pose big challenges for class analysis. The fragmentation of working conditions and of the relations of production has differentiated the laboring class further and brought about an enormous heterogeneity within it. This development has been accompanied by an increase in the concentration of wealth in favor of a tiny upper class on the one side and by the emergence of “new dangerous classes” (Guy Standing) and divisions within the middle classes. This is the fertile ground on which ideologies of social division and right-wing populism breed. The disappearance of a uniting class perspective in the public arena and everyday political life indicates a “demobilized class society” (Klaus Dörre), where class-related dynamics continue to work under the surface of societal discourse while barely being labeled as such in political spaces. The crisis of financial capitalism and of political representation, the weakness and defensive position of leftist parties and trade unions, as well as the dissolution of the broad collective consciousness connected with this weakness form a gateway to political shifts to the right. At the same time, we have witnessed an upswing in forces and formations on the left in countries like France, Portugal, Spain, and Greece. In many countries of the Global North the protest has shifted to issues concerning migration. Discussions on the political left have often been narrowed to the incorrect contradiction of “class” versus “identity.” Some pressing questions that arise in this situation include:

- What are the connections between economic structures, political consciousness, and culture?
- What is the connection between class and other axes of conflict (gender, migration, etc.)?

“We want to call for a global exchange to model a class theory which takes the specific features of single societies into account while also revealing general tendencies on a global scale”

- What role do declassification and distinction play within the dominated classes? How do class relations take effect when there is no representation of class interests in political organizations?
- Which class factions are dominant within single societies but also globally, and how do they articulate their interests?

Class-specific inequalities and transnational class relations

The OECD countries are marked by an increase in unemployment, poverty, and precarity, partly accompanied by a decade-long real wage stagnation. Disparities in wealth and income are reaching dramatic peaks. This trend seems to be solidifying to the extent that class-specific inequalities are even becoming obstacles for further economic growth, thus posing a threat to political stability in the core states of neoliberal globalization themselves. In the Global South, class conflicts are often based on heterogeneous and informal economic relations which include a (partly co-existing) plurality of urban and rural modes of production. Furthermore, tendencies of deindustrialization have nowadays reached countries in the Global North as well. Therefore, we must ask:

- How do classes form against the backdrop of globalization and its crises? What role do nation-states play? Can we refer to something like transnational classes?
- Which struggles can actually be conceived of as “class struggles,” and which cannot? Are there global similarities or connections between these struggles?
- Given informal economic relations, how can we describe classes and class conflicts in the Global South?

Ecological crisis

The causes of and attempts to handle the global ecological crisis are closely linked to class relations and the logics of capital accumulation. The steady drive for economic growth and productivity gains is indifferent towards its ecological foundations and biophysical boundaries. Both the access to natural resources and the distribution of ecological risks and burdens are class-specifically contested. The poor worldwide – but especially in the Global South – bear the main burden of ecological frictions. These social-ecological conflicts will most certainly increase further in the future. A contemporary class theory is bound to include these systematically:

- What is the impact of ecological distortions on class struggles?
- How do ecological burdens affect different classes?
- Which class (r)actions can be convinced of a social-ecological transformation?
- Which class interests impede such a transformation?

> A call for exchange

Obviously, there are more questions to be addressed and not all those mentioned above relate to each national context. They describe tendencies that shape world capitalism today. Hence, we want to call for a global exchange – a global dialogue – on these issues in order to (further) model a class theory which takes the specific features of single societies into account while also revealing general tendencies on a global scale. We look forward to questions, cooperation, and exchanges of any kind. ■

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> Classes and Class Interests in Latin America

by **Pablo Pérez**, Centre for Social Conflict and Cohesion Studies and Universidad Alberto Hurtado, Chile and **Rodolfo Elbert**, CONICET and Instituto de Investigaciones Gino Germani, University of Buenos Aires, Argentina and member of ISA Research Committee on Labour Movements (RC44)



| May Day demonstration in Santiago, Chile, 2018. Photo: Pablo Pérez.

Latin American scholars have attempted to bury the concept of class many times in recent decades. Since the 1980s, despite some differences, scholars have held that neoliberal policies have weakened the working class so much that it no longer influences the dynamics of social and political conflict in Latin American societies. In the last decade, however, workers have ignored these calls for the farewell to the working class. Organizing around work-related issues, revitalizing union activity, and demanding a fairer income distribution in alliance with other popular movements, Latin American workers in specific countries have stubbornly insisted that class continues to be a factor to explain conflict and politics in the region.

>>

Certainly, since the early 2000s the concept of class has been reintroduced into the sociological agenda through the quantitative analysis of socioeconomic inequality (i.e. class mobility studies) and the qualitative study of workers' collective action. Our work is part of this broader agenda, with a focus on class as an objective mechanism that shapes subjective outcomes, particularly oppositional identities and interests. Our recent research, based on datasets from the International Social Survey Programme, showed that 9 out of 10 individuals in Argentina and Chile self-identify with a social class. So much for an outdated concept! In both countries, individuals with a working-class position are more likely to see themselves as workers than those with a privileged class position. We found that the overall rates of working-class identification are higher in Chile than in Argentina. We explain these results by looking at the higher inequality and economic concentration in Chile and the history of "radical" party-union configuration in this country, compared to the state-corporatist incorporation of labor in Argentina.

We think that this type of research can contribute to the understanding of social and political conflict in a region that ranks among the most unequal in the world. Class does not only exist in the social structure and identities of Latin Americans: it can also be observed as shaping people's sociopolitical interests. Individuals from different social classes think about the world in class terms (probably more than some scholars would accept), and often participate in political actions to defend their class interests – from signing online petitions and voting, to joining a union or party. Based on this, our new project focuses on the relationship between class structure, collective action, and class interests. We follow the work of Erik Olin Wright, who defines class consciousness as those aspects of consciousness which have a class content and class-pertinent effects. He argues that, at a micro-level of analysis, the subjective perception of class interests is one of the main aspects of class consciousness. Drawing upon Wright's Marxist-inspired framework, we examine class interests by looking at the ways in which people from different classes subjectively evaluate capitalist institutions and social class dynamics.

Recent literature shows that working-class people are more likely to have critical attitudes towards capitalism and inequality, to hold oppositional views on class, and

to endorse redistributive policies than, say, employers or managers. Our preliminary results are consistent with this literature: country differences aside, Latin Americans located in a working-class or informal self-employed class location have more critical stances towards neoliberal institutions, ideas, or outcomes (e.g. they are more likely to criticize income disparities or the absence of government intervention) than respondents located in a privileged class location (e.g. expert managers).

Our current work seeks to extend these findings through the study of how collective action is a mechanism that might reinforce people's understanding of the material interests shaped by their class location. Thus, we aim to contribute to the analysis of this less-examined side of the causal relation between class, collective action, and class consciousness. We hypothesize that in countries with recent experiences of popular radical mobilization – i.e. countries where the working class and the popular sectors have been central actors supporting the rise of the left – the impact of class location and collective action participation on interests is stronger than in countries with low levels of contentious politics, or where working-class people continue to be excluded from political mobilization.

We believe that it is worth developing these investigations not because class is the only source of political activism in the region, but because we think that the possibilities of a political project of emancipation in Latin America are determined by the political involvement of the working class. This type of activism must certainly go hand in hand with the mobilization against other sources of oppression (and their intersection), such as the massive women's protests and strikes against *femicidios* and for the legalization of abortion in Argentina and Chile; or the more recent *#EleNão* movement in Brazil where women and racially oppressed groups led the way in the struggle against the growth of the extreme right. In a historical context where the right is returning to power, only an empowered working class that defends its class interests in alliance with other oppressed groups will be able to build a left-wing movement strong enough to stop neo-fascism. ■

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> Poverty and Social Exclusion in Post-Socialist Russia

by **Svetlana Yaroshenko**, St. Petersburg State University, Russia



Working from home.

Photo: Solmaz Guseynova.

I began researching poverty in Russia in the early 1990s, when liberal market reforms were implemented. Poverty was regarded as the cost of the radical societal transformation during the transition from the Soviet distributive system to the capitalist system. It was assumed that the introduction of the market would create economic growth, reduce poverty, and generate the conditions for people to pursue economic prosperity and free themselves of state support.

Contrary to optimistic forecasts, and despite economic stability in the 2000s, poverty has persisted in Russia. According to various estimates, between 11% and 25% of Russia's population can be identified as poor. The low official poverty rate, approximately 13% in 2017, is the product of the stingy methods used for calculating poverty and minimal cost of living, while the low unemployment rate has been achieved by expanding informal and underpaid employment. The accelerated expansion of Russia's major cities has been accomplished through internal migration, immigration of workers from the former Soviet republics, and poverty in the non-metropolitan regions. Yet government experts acknowledge that only 40% of Russians can take advantage of the market economy's benefits. This is the same percentage of Russians whose incomes have risen over the last twenty years, while the incomes of the other 60% have stayed the same or shrunk considerably. Poverty has been persistent

among people with jobs and families with children. Russia's Gini coefficient has borne out the growth of social inequality, rising from 0.26 in 1991 to 0.421 in 2010.

My colleagues at the Komi Science Center and I conducted a longitudinal qualitative research study of registered poor people and surveys of urban residents in the North region of Russia in the 2000s. We discovered social exclusion was expanding. Class, gender, and defensive reactions to the market economy have contributed to poverty's persistence and to its specific features. Social exclusion has become institutionalized.

The low-paid jobs sector has expanded. The first restructuring of employment, in the 1990s, led to layoffs in heavy industry and expansion of the retail trade and service sectors. These new jobs were generally lower paid and provided minimal benefits. Subsequently, in the 2000s, the public sector was optimized, and access to social services, including non-marketized services such as education and medical care, was curtailed. As deindustrialization and, later, a marketized service economy proceeded apace, a discussion arose over which sector had suffered most from market reforms and, accordingly, was the neediest — blue-collar workers or public sector workers. We found that blue-collar workers were not only the first to experience the negative effects of market reforms but also constituted the largest segment among extremely poor people.

Moreover, most socially-excluded Russians — i.e., people dwelling in extreme poverty over an extended period — were employed on the labor market's fringes. The market also had gendered impacts: we found that poverty was not

only highly feminized, while men were undergoing widespread lumpenization. In half our cases, people's incomes were too low to support anyone but themselves.

Whereas in the early 2000s, the lower a person's social class, the higher the likelihood that they would slip into poverty, ten years later, gender was no longer dependent on social class: single mothers from different social classes were more likely to suffer from economic hardship. In other words, the reduction of the social benefits previously enjoyed by wage workers under actually existing socialism has not been offset by growing opportunities in the emergent market economy. The pressure of structural constraints has increased: class and gender have operated in parallel.

While market relations extended to employment (production and reproduction), social policy radically changed. Amid faith in the free market, unequivocal criticism of actually existing socialism, and the widespread rhetoric about the need for liberation from Soviet paternalism (the "ineffective" and "totalitarian" Soviet system that had shaped the culture of dependence on the state), there was a de facto reduction in the state's obligations to maintain a basic level of welfare. Since 1991, the method for calculating the minimum cost of living in Russia has been amended three times and become more stringent, and the minimum wage has ceased to correlate with the actual minimum for financial security.¹

Meanwhile, the labor-based principle of granting access to common goods has been maintained as a key social policy criterion, as evidenced by the correlation of the minimum wage, pensions, and child-rearing benefits to the minimum cost of living.² However, the workplace is no longer the epicenter of benefits allocation; it has been replaced by the household. Access to child-rearing benefits, housing subsidies, and targeted social assistance is now determined by assessing a household's income. Social policy is implemented selectively, in keeping with the beneficiary's income and willingness to meet certain requirements.

Consequently, poverty has been stigmatized: it has gone from being part of life and a temporary phenomenon, as it was in Soviet times, to becoming a persistent, total problem. Further, the provision of social assistance has been managed in such a way that the neediest people are ignored. Among registered poor people, one third is in

extreme poverty, two thirds are employed, and two thirds are women-headed families. Thus, targeted social support compensates for low wages. It is no longer an insurance against the risks of unemployment and poverty.

An ideology of individual responsibility has required extremely poor people to mobilize all resources at their disposal and make incredible efforts to avoid poverty and social exclusion. They use resources amassed in previous times to offset the effects of the restructured employment system, the collapse of the erstwhile socialist distributive system, and the implementation of the most liberal market project in a former socialist country. Workers have been forced to migrate to find employment, and to take second and part-time jobs. Women in the service sector struggle around gender issues, as workers, and as primary caregivers in a context of privatized social care. Pensions are used to complement low wages: about a third of our respondents who were employed were working pensioners.

Currently we see the vortex expanding, as professionals such as physicians and university lecturers are subjected to economic instability. As Tatiana Lytkina's research in a depressed part of the Komi Republic showed, poverty expanded outward in concentric circles, eventually reaching all inhabitants of a town. Clearly, the opportunities and advantages enjoyed by certain groups in major cities are supplied by the market only because it displaces many other people to society's margins.

Meanwhile, the state's recent proposed pension reform, including a raised retirement age, became an arena for different political groups to compete for attention, rather than a forum for discussing the country's prospects and the needs of rank-and-file Russians. As in the 1990s, Russia's young people took to city streets to protest, demanding a better future for their generation.

This essay relies upon the following articles: Svetlana Yaroshenko (2017), "Lishnie liudi, ili O rezhime isklucheniia v postsovetском obshchestve" [Superfluous people or the regime of social exclusion in post-Soviet Russia], *Ekonomicheskaya sotsiologiya* 18 (4): 60–90; Tatiana Lytkina and Svetlana Yaroshenko (forthcoming), "Vozmonaia li sotsiologiya dlia trudiashchikhsia klassov v Rossii" [Is blue-collar sociology possible in Russia?], *Mir Rossii*. ■

Translated from Russian by Thomas Campbell.

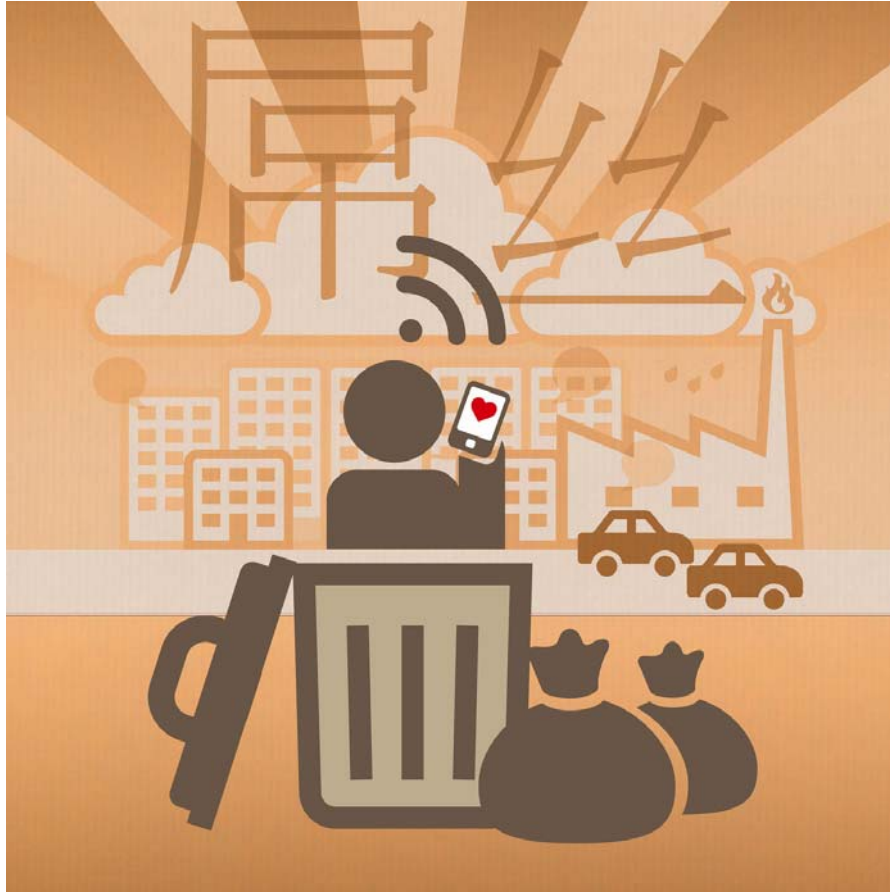
1. The minimum wage has been pegged to the minimum cost of living only since May 1, 2018.

2. In 2010, the minimum cost of living for an individual in Russia was 5,685 rubles. The minimum wage was 4,330 rubles per month. The minimum monthly unemployment benefit payment was 850 rubles, while the maximum payment was 4,900 rubles. The minimum old-age pension payment was 6,177 rubles a month, while university scholarship students received a monthly stipend of 1,340 rubles. The minimum child-rearing support payment was 2,020 rubles a month, while the average monthly wage was 20,952 rubles. One Russian ruble was worth 0.023 euros on January 1, 2010; it was worth 0.024 euros on December 31, 2010.

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> *Lumpenproletariat* and Urban Subalterns in China

by **Ngai-Ling Sum**, Lancaster University, UK



| Illustration by Arbu.

Marx and Engels used the term *Lumpenproletariat* in mainly descriptive, pejorative, and rhetorical ways. The “underclass” occupies a similar place in recent economic and political discourse, while the “precariat” has a more positive connotation. This paper employs Gramsci’s notion of the “subaltern” or “subordinate” classes, which aimed to capture the multi-dimensional nature of exploitation, oppression, and marginality of diverse subordinate groups as well as their relative lack of autonomy from the hegemony of dominant social groups. My case study considers how the lived experience of poverty and inequality of a specific stratum of the urban poor in China since the 2008 financial crisis has been reflected in the development of a new identity – *diaosi* – which uses social media to create both personal narratives and a subculture that inverts hegemonic values and norms in a self-mocking way.

> The subaltern *diaosi* (loser) identity in China

The 2008 financial crisis aggravated the conditions of the urban underclass, initially because of rising unemployment and then because of the effects of debt-based urban mega-project and real estate booms triggered by a massive government stimulus program. The debt-fueled property boom led to rising housing prices, residential rents, and ghost towns; increasingly, precarious migrant workers endured long hours with low pay without rights to urban residence and related welfare benefits. Those without factory-provided dormitory accommodation had to pay higher rents for sub-standard accommodation at the peripheries of towns, or lived in liminal spaces (e.g., balconies, roof tops, containers, or underground bunkers) in urban centers. In Beijing in 2014, for example, close to a million migrants rented shared small rooms at around USD 65

per month in underground air raid shelters and storage spaces without natural light and with communal toilets and kitchens. They comprised low-wage service workers, such as waiters, hairdressers, janitors, shop assistants, street peddlers, chefs, security guards, and construction workers. These subaltern groups are dubbed a “rat tribe” as C.Y. Sim shows in his 2015 video (subtitled in English): <http://creativetimereports.org/2015/01/24/sim-chi-yin-rat-tribe-beijing-underground-apartments/>.

Since late 2011, many young migrant workers in real or digital factories, who are also heavily involved in Internet pop culture and social media, responded to their feelings of inequality and injustice by narrating their marginality and subalternity in terms of a new identity. The *diaosi* subject position – literally, fans of a celebrity footballer – emerged in on-line battles between rival fans. This identity was then self-mockingly reinterpreted as “fans of penis,” a close homonym. This transposition soon went viral on social media. Two months after this identity was coined, it had attracted 41.1 million Google searches and 2.2 million blog posts on China’s Twitter-like Weibo. Young subalterns started to proclaim themselves as *diaosi* and all kinds of associated chat rooms and social media were set up (e.g., YY and QQ chats).

New meanings were added as the discourse and identity circulated in the social media. It soon came to condense migrant workers’ feelings of inequality, marginality, exclusion, economic hardship, frustration, and social pain as well as their unfulfilled consumer and romantic desires. They represent themselves as having underprivileged backgrounds, earning a meagre wage, consuming little, and lacking social connections. Their meagre income, consumption, and borrowing capacity as well as their low social standing are coupled socio-emotionally with a sense of living a devalued life: of long working hours, poor housing, uncertain career prospects, missing home-life, guilt towards parents at home, and an empty emotional and romantic life. This is often highlighted in *diaosi* narratives

of how they spent Valentine’s Day, Christmas, festive seasons, and the small hours of the night looking for Internet companions. Such affective discourses from the margins express collective social experiences grounded in inequalities generated in everyday urban economic and social life.

This everyday existence of *diaosi* subalternity is also expressed through a biopolitical binary that depicts two main gendered body types based on their unequal access to income, consumption opportunities, power networks, love, romance, and intimacy. Male *diaosi* self-deprecate as “*poor, short, and ugly*” losers. With meagre income and unattractive physiques, they construct themselves as unable to impress girls by showering them with material gifts and/or charming them. They have “no house, no car, and no bride/girlfriend” and spend most of their time at home, using cheap mobile phones, surfing the Internet, and playing media games such as DOTA. This construction has gradually spread to female subalterns. Then there are the *gaofushuai*. Members of this superior group are (1) “*tall, rich, and handsome*”; and (2) “*princelings*” with special party and state connections enabling them to gain advantages in employment and access. They enjoy the “three treasures” (iPhone, sports car, and designer watch) and can attract beautiful girls. This binary involves a mix of latent critique, self-mockery, self-protection, and self-entertainment. It is an everyday way of protesting and relieving insecurity in state-capitalist China. The resultant gaps between these two imagined groups are further highlighted online via satirical cartoons, photographs, TV shows, fantasy talks, etc. The two groups have different modes of transport (bus vs. BMW), smartphones (Nokia vs. iPhone), eating places (side-street stores vs. expensive restaurants), and romantic encounters. In short, *diaosi* narratives reflect the self-mockery of a fate with no future or hope; the emotional emptiness in romantic life; the latent hostility towards the social elitism embodied by the princelings; and the despair of not being accepted in an unequal society. ■

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> Class Formation and Agrarian Capitalism

by **Tania Murray Li**, University of Toronto, Canada



| A village surrounded by oil palm plantations. Photo: Tania Li.

Who owns what? Who does what? Who gets what? What do they do with the surplus? These four questions, concisely posed by agrarian scholar Henry Bernstein, offer a useful starting point for the analysis of rural class formation. The questions work especially well in places where ownership of farmland, and the capacity to invest surplus in increasing farm scale and efficiency determine which farmers can sustain their farms and accumulate, and which are squeezed off their land. I studied such a place in a remote corner of rural Indonesia, where I tracked the rapid formation of rural classes after indigenous highland farmers staked out individual plots from their former common land, and started to plant cacao. From then on, they did not have the option to withdraw into subsistence production, as their small residual plots of land could not grow enough food for the family and to cover cash needs for clothing, school fees, and so on. Hence they had to intensify market-oriented production, and hope to make enough money to cover family needs and keep their farms productive. Those who failed lost their land. It was a textbook case of what happens when small farms become just like small

firms: governed by capitalist relations, they are vulnerable to losing everything when they cannot invest to keep their enterprise competitive; and they cannot just hold on as they are either, for they cannot make ends meet.

Increasingly, the process of agrarian class formation I have just described is modified by a range of other factors. The most important are government transfers and remittances. A farm family receiving a regular government cash transfer like Brazil's "Bolsa Família", or remittances from family members working elsewhere, has a cushion to protect them from losing their farms when times are hard (e.g., when there are low prices, unmanageable debt, bad harvests, sickness or family emergencies). Remittances may be used to buy land, engage in money lending, or invest in education. They can also be used to build impressive houses or stage elaborate weddings that may look like wasteful expenditure, but serve to build a family's social networks and increase its access to productive resources (e.g., contracts, loans, information, subsidies). We can see "remittance houses" and other symptoms of the transformed roles of land, labor, and capital all over ru-

ral Asia, Africa, and Latin America today. At this point, the four questions outlined above (who owns what, who does what, who gets what, what do they do with the surplus) can still serve to analyze rural class formation, but they need to be interpreted more broadly to incorporate a wider range of off-farm relations.

Moving up the scale from small or household-based farms to control over large tracts of land, class analysis is complicated by the non-market powers that determine “who owns what” and “who gets what” in rural areas. In the Philippines, as in much of Latin America, big landlords who obtained their land in Spanish colonial times dominate politics, and they fix the rules so that they can hold onto their land whether or not it is productive. In Indonesia and elsewhere in Southeast Asia where there is no colonial history of large landholdings, contemporary politicians and government officials use the official and unofficial powers of their office to obtain access to large tracts of land. In these places, it is not land that yields political office, but political office that yields land. Since the land may be held in speculation, or flipped for a profit, being a “landowner” does not necessarily have much to do with capitalism or with agriculture.

Understanding the class character of large farms and plantations has become urgent today, because this form of production is greatly expanding. In Indonesia, for example, massive oil palm plantations cover 10 million hectares, and the government wants to expand the area to 20 million. In Laos and Cambodia, it is rubber plantations that take up more and more space. In Brazil and neighboring countries, it is massive mechanized soy farms. Often these large farms and plantations, whether they are owned by individuals or by national or multinational corporations, are not “capitalist” in the textbook sense, as they do not pay market price for any of their inputs. They are hugely subsidized by the lease of state-claimed land for free or at minimal cost, state-supplied infrastructure, tax breaks, and cheap credit. Sometimes, they also obtain cheap labor, conveniently supplied by state-backed migration schemes.

In fact the multinational “investor” — often imagined as the model capitalist — may invest very little or nothing at all, relying instead on free and subsidized inputs. Large farm enterprises may rely heavily on contract farming or outgrower schemes, which muddy the question of who really owns what, and who gets what portion of the profits that flow. Subsidies for large farms are justified by the argument that large scale producers bring “development” and jobs — heavily discounting the more varied kinds of jobs and development that they displace, or the opportunities for coercion and extortion that go along with their monopoly position.

Government officials and politicians profit from the expansion of large farm enterprises, which open up a stream of revenue from permits, fees, kickbacks, and extortion. They often sit on corporate boards. How can we analyze the class configuration of these personal-state-corporate hybrids? The class relations we can observe between capital and labor at the point of production are still important, but other scales and relations need to be examined as well. Global capital doesn’t just land in a country like Brazil or Indonesia by itself — its path is enabled by all kinds of links, coalitions, laws, and discourses. Some of the terms coming up in the literature highlight the entanglement of state and non-state powers in enabling this kind of investment, hence “predatory elites” or “crony capitalists.” Such hybrids are not unique to agriculture or to the Global South. Major corporations are very often supported by political favors and state-licensed monopolies, and reap mega-profits from their capacity to capture unearned rents. The initial four questions can still serve as a guide for analyzing these formations: we still need to know who owns what, who does what, who gets what, and what they do with the surplus. But again, the questions need to be stretched to incorporate forms of property, work, and investment that operate across scales. The more stretched and entangled the class formations, the more obscure they are to the plantation workers, contract farmers, or independent smallholders who are locked into extractive relations they cannot identify, still less contest. ■

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> Living with (and Resisting) Welfare Reform in the UK

by **Ruth Patrick**, University of York, UK



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Over the past 35 years, the UK's social security system has been subject to wave after wave of reform. Changes have been implemented as part of efforts to end what politicians so often describe as “a culture of welfare dependency” and an ever greater role has been found for welfare conditionality – the attachment of conditions (most often work-related) to benefits receipt. Significant changes occurred during the New Labour governments, and then again under the Conservative leadership post-2010. The scale of cuts to state support has been staggering, and the consequences extreme. A few figures are instructive here.

Compared with 2010, by 2021, as much as [£37bn less](#) will be spent on working-age social security and this is despite rising prices and increased living costs. This represents a 25% reduction in total benefits expenditures, with particularly big cuts in expenditure on disability benefits, which are designed to help some of the most vulnerable in our society.

Not surprisingly, the impact of these cuts in social security support is borne out in rising child poverty, increased

destitution, and a growing reliance on food banks among many of the UK's poorest families. The Institute for Fiscal Studies estimates that absolute child poverty will rise by four percentage points between 2015-16 and 2021-22, attributing three-quarters of this increase (equivalent to 400,000 children) to benefit changes. The anti-poverty charity – the Joseph Rowntree Foundation – estimates that over [1.5 million](#) individuals faced destitution at some point in 2017, while the UK's largest food bank provider – The Trussell Trust – handed out [1,332,952](#) parcels of three-day emergency food supplies to people during the financial crisis year of 2017-18.

Despite these figures, the UK government remains committed to benefit changes and continues to justify and uphold its package of welfare reform. It is continuing with the introduction of Universal Credit, a benefit designed to simplify the benefits system and sharpen incentives to work, but one that has been plagued by problems with its design and implementation. Prime Minister Theresa May continues to argue that “work is the best route out of poverty,” despite the evidence that as many as two-thirds

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Still from the movie "All in this together. Are benefits ever a lifestyle choice?" presented by the Dole Animators (2013).

Copyright: Dole Animators.

of people in poverty are now living in households where someone is working.

> The lived experiences of welfare reform

Against this context, it is vital to explore everyday experiences of benefit changes, and to document the impact that welfare reform is having on the lives of those directly affected. This has been the purpose of [The everyday realities of welfare reform study](#), which has tracked a small number of people affected by benefit changes living in a northern city of England. Through repeat interviews with jobseekers, single parents, and disabled people, it has been possible to track the impact of welfare reform on individual lives and the ways in which a political narrative that says "welfare reform is necessary, and is working" contrasts very strongly with the lived experiences of those directly affected.

For the participants in the study, repeated changes to their benefits have created a climate of *social insecurity*, with constant worry and anxiety about the impact of changes and how individuals will cope with them. The processes of claiming benefits also cause worry, with disability benefits assessments in particular being a source of extreme fear and uncertainty. Sharon described how she felt about having her disability benefits constantly reassessed: "It puts a lot of stress on [me]... I think about it all the time."

Further, the increased welfare conditionality is experienced very negatively, with the threat of sanctions and subsequent loss of income a constant possibility that preoccupies claimants and leaves them fearful about how they would cope if their benefits were taken away. Even those who comply with every element of the conditionality regime worry nonetheless, and are resistant to engaging with Jobcentre Plus "support" for fear that it will lead to further conditions, and make a sanction more likely.

There is evidence of increased poverty and hardship, with many participants recounting the very difficult choices they have to make (often daily) such as whether to heat or to eat, and how parents so often go without so that their children can have what they need. As Chloe put it: "We're paupers, we're so poor. It's like we're living in – you know

when you see all those adverts – please feed our children – feed my bloody children."

What the research also shows is the ways in which people experience the stigma of benefits, and feel that their own eligibility and entitlement for support is being questioned by the conditionality regime, and by repeat benefit reassessments. They also describe the institutional stigma they experience when visiting Jobcentre Plus or engaging in forms of welfare-to-work support. Here, they regularly encounter advisers who they feel look down on them, and treat them without either dignity or respect. Sophie explained: "Basically they [job center advisers] look at us like rubbish."

Overall, the research illustrates the very stark mismatch that exists between the popular political characterization of "welfare" and the lived realities, and the ways in which welfare reform makes the lives of people living in poverty only harder still.

> A growing resistance

Over recent years, alongside the continued benefit changes, the UK has also witnessed a growing resistance to the reforms taking place. Importantly, this is coming in part from groups of people with direct experience of poverty and of out-of-work social security receipt, coming together to challenge the popular characterization of "welfare" and to campaign for change. For example, some of the participants from *The everyday realities of welfare reform* study came together in 2013 to make a film that documented their experiences, in what became known as the Dole Animators project. The [Dole Animators](#) remain active, and have most recently been involved in [Poverty 2 Solutions](#), working with two other groups to develop blueprints for what might really make a difference in tackling poverty. These two examples join countless others, and are evidence of a refusal to accept the partial account of welfare reform offered by mainstream politicians. This activity is very important, and is a much-needed source of hope, especially when set against the context of rising poverty and hardship as UK benefit changes continue to take effect. ■

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> Class and Ecology

by **Richard York**, University of Oregon, USA and **Brett Clark**, University of Utah, USA



To build a better world and save the environment, capital's hold over the world needs to be broken. I. Ransley/flickr. Some rights reserved.

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Capitalism is a system predicated on the endless pursuit of accumulation by and for the capitalist class. The capitalist system accomplishes this goal through rampant expropriation and exploitation, inevitably generating environmental degradation and social inequalities.

Expropriation — a process of robbery — has involved the destruction of customary rights and dissolution of non-capitalist productive relations, as well as enslavement. Colonial violence and land seizures helped privatize the means of production, creating a class and racialized system of accumulation. This process allowed for the plundering of natural resources and peoples throughout the

world, which in part served as the foundation for the rise of industrial capitalism. Dispossessed peoples were then forced to sell their labor power in order to earn wages to purchase the means of subsistence. In low-wage countries, the rate of exploitation of labor power is extremely high. Here super-exploitation results in the massive transfer of surplus to core capitalist nations. Capitalists control the social surplus — produced by society as a whole, in its interaction with the larger biophysical world — and accumulate capital. Additionally, they expropriate unpaid social reproductive work, which helps sustain life. This work is disproportionately done by women, which produces additional social inequalities.

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Capitalism endangers people's well-being as well as the environment. M. Crandall/flickr. Some rights reserved.

Given the growth imperative of capitalism, this system runs roughshod over planetary boundaries. Each expansion in the production process, in order to sustain economic operations on a larger, more intensive scale, generates additional resource (i.e., matter and energy) demands, and creates more pollution. This progressively results in environmental degradation of a scale and category never seen previously in human history, exceeding the regenerative capacity of ecosystems, flooding ecological sinks, rupturing natural cycles, and exhausting resources. Capital's alienated social metabolism – the relationship of interchange between society and the larger biophysical world – is evident in climate change, the amplification of biodiversity loss, and ocean acidification, just to name a few of the most pressing environmental concerns.

In the logic of capital, all of the world – people, non-human animals, plants, rocks, air, water, and so forth – serves as a means to facilitate the accumulation of private profit. When the workings of capitalism are properly understood, the intimate connections between class exploitation and environmental degradation are clear. This also illuminates the importance of class struggle, including the fight for social justice, and radical environmental movements.

However, the dominance of capitalism around the world has distorted popular understandings of not only the causes of environmental problems and social injustices, but even what it means to improve the human condition. For two centuries – and increasingly so, following the Second World War – it has been widely accepted across most nations that economic growth is synonymous with “social progress” and “development.” Therefore, it is taken for granted that societies should pursue endless economic growth (as measured by monetized exchange value). These approaches are supposed to increase consumer de-

mand and enhance the quality and quantity of goods and services, providing benefits for everyone, if unevenly. This type of development is touted by business and government leaders as the solution to poverty and as the way to improve conditions for workers. It is also identified as the appropriate path to address environmental problems by spurring innovation and technological fixes. In other words, it is argued that all improvements depend on continuous economic growth. This popular depiction completely ignores the fact that the modernization program of capitalism has caused a long series of accumulating environmental problems, while leaving hundreds of millions in poverty and creating extraordinary inequalities within and among nations.

Nevertheless, due in part to the ideological dominance of capital, its structural organization, its global power, and its alienated system of production, many workers, unions, and even left-leaning governments around the world accept all or part of the capitalist development agenda as the way to improve quality of life. One especially malicious aspect of this is that many people who are harmed by capitalism do not blame the capitalists or the economic system for their woes, but rather blame environmentalists, immigrants, socialists, feminists, people of other races, and a variety of other groups – who are not enemies but potential allies.

The workings of capitalism create numerous challenges and obstacles to broad mobilization in opposition to the system. The stratified global economic system leads to uneven development, whereby cheap labor in the global South is used to produce goods destined for the North. Under these conditions, economic surplus is transferred to capitalists in the latter, while the environmental degradation and industrial pollution associated with commodity production is disproportionately concentrated in the for-

mer. To make matters worse, the immediate consequences of climate change, such as flooding and severe drought, have already had devastating effects in the global South, especially among the most vulnerable populations. Capitalist operations have resulted in an array of environmental injustices, which disproportionately burden people of color and the poor, resulting in additional divisions and inequalities within populations. At the same time, capital exerts its power and influence to maintain its operations and to prevent serious civic debate and political action to address environmental problems, such as climate change. In all of this, the capitalist system generates numerous social and ecological contradictions. It is clear that a broad, unified revolt, comprised of diverse classes, with distinct experiences of expropriation and exploitation, is necessary. However, how this opposition organizes and transcends geographical boundaries and the various social divisions is an emergent process in the making.

This global uprising offers the possibility to create a better world. Some of the general foundations of this revolutionary transformation include challenging how capitalism frames the meaning of development, standard of living, quality of life, and wealth. The workings of capitalism are antithetical to fulfilling human needs, advancing social justice, and preventing environmental degradation. The radical, but eminently sensible, alternative to capitalism is to build societies where the central aim is not to expand production and consumption so as to facilitate the accumulation of private wealth. It is to make people's lives better by building communities grounded in equality and

justice, whereby all people have not only their basic needs met but also have creative outlets, leisure time, and aesthetic pleasures, including a beautiful environment. Building this alternative world does not entail fossil fuels, more cars, more planes, more plastic, more electronic goods, more shopping malls, or more factory farms. Therefore, it does not necessitate more environmental destruction. It requires social, political, and economic change.

In short, breaking capital's control over the world is necessary for building a society that sustains diverse ecosystems, a stable climate, and a non-toxic environment while also providing a good quality of life for all humans. In light of this verity, neoliberal approaches to addressing environmental problems, which look for market solutions and technological fixes, are doomed to fail. What is needed is a radical environmental movement that challenges power and works for a restructuring of socioeconomic relations, creating meaningful, non-alienating work. This involves confronting how the legacy of colonialism and imperialism has served to perpetuate racial and economic injustice across and within nations, and eliminating the rapacious assault on ecosystems by corporations, governments, and development organizations.

Likewise, if we are to build a better world, socialists, feminists, anti-colonialists, and others working for social justice must recognize that the environmental crisis is not simply one issue among many, but rather is intertwined with the oppression of peoples and is at the core of the contradictions of capitalism. ■

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> The Choke-Chain Effect

Capitalism Beyond Rapid Growth

by **James K. Galbraith**, University of Texas, USA, and **Klaus Dörre**, University of Jena, Germany



The conference 'Great Transformation. The Future of Modern Societies' will take place in Jena, Germany in September 2019.
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The economies of early industrialized countries have left the time of rapid growth behind. One of the reasons for this end of rapid economic growth in these countries is a trend towards tightened profits that James Galbraith has called "the choke-chain effect".

The term describes the fact that the resource- and energy-intensive economy that emerged after 1945 in East and West alike, which ensured prosperity through high growth rates, cannot continue unchanged because the efficiency of such an economic type can only be increased as long as resources remain cheap. However, resource intensity also means high fixed costs, which amortize only over a long period of time. These costs can only be justified if the system is expected to remain profitable over a longer time. Political and social stability is therefore a central functional condition of this type of economic activity. Because of their stability requirements, high fixed cost systems are particularly vulnerable. But what happens when times become uncertain and commodity and energy prices rise? The time horizon for profits and investments is reduced, and the total surplus or profit of a company is lower than in stable times. Because profits are shrinking, distributional conflicts on all levels – between workers, management, owners, and tax authorities – are intensifying because confidence in a positive development begins to waver.

This "choke-chain effect" further intensifies if (a) there is a scarcity of a crucial resource, in the sense that aggregate demand exceeds the total supply at the ordinary price, and (b) the supply of that commodity can be manipulated by hoarding and speculation.

Like the choke collar in a dog, the effect does not necessarily prevent economic growth. But as the consumption of energy resources accelerates, prices rise quickly and profitability drops rapidly. This lowers investment, sows doubts

about the sustainability of growth and may also trigger a (perverted) tightening of other economic levers.

These considerations do not even cover the high costs of climate change. Commodity and energy costs are not the only causes of the major 2007-2009 crisis, nor are they the sole cause of comparatively low growth rates in the old capitalist centers. However, resource issues, once the cost of climate change becomes acute, could prove a major obstacle to growth. The problem is obvious: To allow organized life on the planet to continue in its present form, massive reductions in carbon emissions will be necessary, and this will be costly; in addition, much of the current energy-consuming business activity would become unprofitable.

Despite the internal economic controversy surrounding this, the analysis is of importance to the discussion of capitalism, growth, and democracy in at least three respects. Firstly, it becomes clear that post-growth societies – more precisely, post-growth capitalisms with relatively weak or no growth in the rich North – have long since become a social reality. The causes for this development are partly structural, partly political. With the conversion of private debt into public debt in order to save banks, the countries of the Eurozone have bought time, but a sustainable solution to structural economic imbalances is not included in the measures taken. The European austerity policy has failed, and even some of its protagonists now admit that, especially in the Greek case.

But Keynesian policies with higher wages and increased demand are not really an alternative. The current proposals overlook the structural power gap that has been further consolidated with the European debt regime. Because financial markets are globally linked and investors assess risks internationally, adjustments in individual countries do not add up to much. In other words, structural obstacles block the way to lasting economic recovery. It is quite possible that in some countries and regions the economy will grow at high rates for a long time, but growth and distribution are becoming ever more uneven, and overall a return to the high growth rates of the past is not expected.

Secondly, if this is correct, it implies that it makes little sense to normatively exaggerate the concept of post-growth society or even reserve it for post-capitalist alter-

natives. Instead, we need to figure out what slow growth with permanently low growth rates means for the relation between capitalism and democracy. Obviously, capitalist economies can stagnate over longer periods of time (see Japan, Italy) or even shrink (Greece) without any change at the core of their socioeconomic structure. And in its power structures, relatively stable capitalism with weak growth rates is thus possible for longer periods of time – but whether this also applies to the stability of democratic institutions and procedures is another matter.

Thirdly, it also means that while we argue that a return to rapid growth is not possible, a blanket critique of growth and capitalism and the idea of a stagnant or even shrinking economy do not seem to be the way forward. Instead, a consciously slow-growing new economy that incorporates the biophysical foundations of economics into its functioning mechanisms could be a solution. A stagnant or even shrinking economy will always produce few winners and many losers. For these reasons, a kind of economic activity is needed in the future, which could guarantee slow, stable growth over longer periods of time. We suggest a decentralized capitalism with slow growth as desirable. Such capitalism, however, would be significantly different from its financialized varieties. It would have to significantly reduce the size of institutions and organizations (the military) whose fixed costs include an expansive use of resources, and abolish the banking sector as a whole. It would ensure all citizens a decent standard of living, make early retirement possible, raise the minimum wage strongly, relieve the burden of tax on labor but significantly increase inheritance and gift taxes. Most importantly, it would provide incentives to ensure active spending on a socially and environmentally sustainable infrastructure rather than passive accumulation. Whether this is a realistic scenario is an open question.

Sociology must join the search for an answer. An attempt will be made as part of the conference 'Great Transformation. The Future of Modern Societies' which will take place at the end of September 2019 in the German university town of Jena. There, we want to launch a research network which will open the possibility for sociologists and economists to participate in a global dialogue on a future beyond rapid growth. ■

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> The Post-Growth Condition

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*Economic growth has long been at the center of western politics.
Photo: LendingMemo.com/flickr. Some rights reserved.*

Growth in a capitalist society has multiple meanings and implications, as does the specter of its breakdown or end. It is a material fact, a monetary representation of economic scale and also an idea, a central and very difficult one to challenge in a capitalist society. The post-growth condition refers here to a context where this challenge becomes not only possible but necessary.

Growth refers in the first instance to what the GDP and other metrics of national accounts measure: the size and dynamics of capitalism as a monetary production economy. These include the amount of commodities produced (output) and consumed (demand); the accumulation of stocks; and investment in fixed capital, be it tangible (machines) or intangible (R&D, patents). This translates into employment, generating monetary income in the form of wages, profits, taxes, interest, and dividends.

Growth from this narrow economic perspective means both more output and more capacity to produce output. The growth rate, expressed as a percentage, represents the intensity of this expansionary process. In modern capi-

talist societies growth appears as the “normal” state of the economy, one number – GDP – expresses and subsumes the myriad social and material relations that make up this fact. A low growth rate will see the emergence of conflicts of distribution between capital, labor, and the state. A prolonged decline of growth rates (“secular stagnation”) will generate a prolonged state of instability and conflict. Declining growth rates in capitalist economies are a self-sustaining phenomenon: states cut back expenditure; corporations cancel investments and cut back production; capitalists hoard profits or shift them to the financial sphere; workers lose their collective class power as they divide themselves in defensive struggles; and demand weakens in economies used to a wage-led growth dynamic. This has been the experience of many core capitalist countries since the 2008 crisis.

Growth is then a central means of regulating the inner class contradictions of capitalist societies. Founded on accumulation through exploitation, capitalism finds stability in growth: wages rise in tandem with profits; full employment accompanies high investment; class conflict is attenuated and becomes manageable; the growing surplus

is absorbed in the form of a rising “standard of living” for most, but also by a widening welfare state. If growth falls below a certain rate all this starts to unravel. This is not immediately a concern for capitalists, who can compensate for faltering growth by squeezing higher profits from production. Of course this further dampens demand and growth because it is labor income that will ultimately be squeezed, but workers can always resort to the credit card, or the output can be sold to “un-squeezed” consumers elsewhere. In this conjuncture it is the organized parts of the working class that are “growth demanders”: they propose and struggle for policies that induce a higher growth rate: higher social spending by the state, wage growth, and finally higher “real” and job-creating investment by firms. If secular stagnation, understood as a deeply embedded and class-reinforced structural tendency towards a zero growth rate, truly represents the future of advanced capitalist societies, then we will remain in this paradoxical conjuncture of growth-hungry workers and social movements – what we can call a progressive growth coalition – facing growth-indifferent corporations and blasé capitalists. One can readily imagine the challenge this represents for critical sociology and theories of capitalism.

GDP measures an economy’s size in relation to itself. Because it is expressed in monetary units, it is as if capitalism is a self-contained system that “grows on itself.” But since Polanyi, we know that capitalist relations develop and grow inside wider social relations and institutions that they subvert to their logic, sometimes destroying the very foundations of growth in this process. Feminist theory has furthermore shown the central dependence of labor, value, and capital on “unvalued” reproductive work such as care. Not only does the economy grow through something (social relations) but it grows on something (reproductive work and care). Applied to North-South relations, it can further be argued that growth of the advanced capitalist core also rests on the capacity to externalize to a Global South or periphery the pressures inherent to what can be called an imperial mode of living. When redefined as an expansion of commodified social relations, as externalization, and as more intense demands on unvalued reproductive work, demands for stronger, more robust, and inclusive growth by a progressive growth coalition can provoke a sobering unease.

This is further complicated when growth is considered as a material process, when the disruptive effects of extraction, production, consumption, and waste on ecosystems, living beings, and global biogeochemical cycles are understood and acknowledged, such as in the case of climate change. Biophysical scale – the aggregate size of the economy relative to the ecosystems and, more globally, the earth systems in which it is embedded – and the intensity of the biophysical impacts (depletion, pollution, artificialization) give us a new representation of an inherently bounded and limited economy. The emerging field of Social Ecology

has developed metrics and categories that capture growth and scale of capitalist economies in biophysical terms. The sociological presumption is that our metabolism as individuals is subsumed by a wider social organization of metabolism at the societal level. Socio-economic metabolism can be measured as the throughput of matter and energy needed to produce the output of consumption and investment goods and services in a capitalist society. Once we have shaken off the shibboleths of a monetary production economy decoupled from any biophysical base, of dematerialized accumulation (as if we could live off a Twitter feed!), and understand the tight articulation of biophysical throughput and monetary production as well as the embodiment of capital in artifacts (buildings, machines, infrastructures) that only work if fed with energy and matter, then the question of biophysical limits to growth becomes a fact as hard and evident as GDP.

From this biophysical perspective, the post-growth condition points to the ecological contradictions of capitalist society and its economic growth. These contradictions exist on their own and can no longer be treated as secondary or derivatives of the true inner contradiction between labor and capital. The post-growth condition thus entails an enriched ecologized materialism alongside the more traditional historical materialism on which critical theory has developed since Marx.

As this mode of analysis of capitalism has developed over the last decades it has become evident that the metabolism of advanced capitalist societies must be scaled down. But it has also become evident that scaling down the biophysical growth of a capitalist economy is an impossibility, as John Bellamy Foster has argued – even when GDP growth rates are abysmally low, biophysical scale does not follow. The myriad of mechanisms that keep the accumulation treadmill of capital materialized in ecologically unsustainable metabolic and biophysical processes have been painstakingly documented by ecologized social theory.

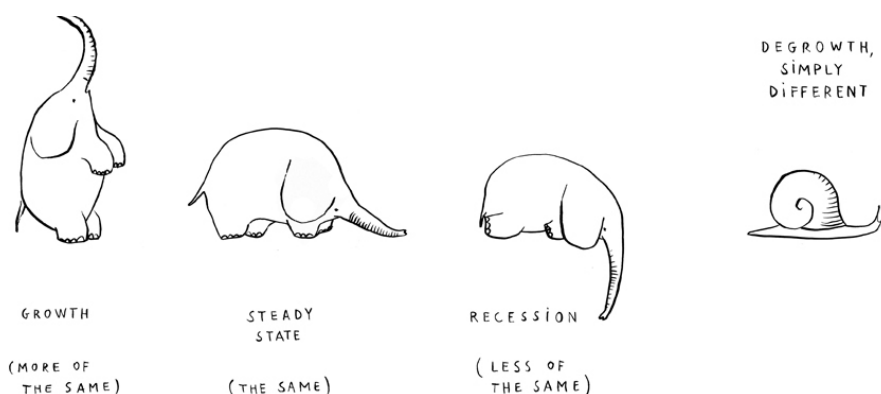
Facing and resolving these ecological contradictions means scaling down the economic process of capitalist societies. But the institutionalized social relations of production and consumption in capitalist societies are based on a constant scaling up of the economy and intensification of its effects. The more it is riven by contradictions and faces barriers to its development, the more growth will be considered a solution by its constituent social classes. Modern capitalist societies need and want growth for economic, political and cultural reasons, and yet their metabolism must be scaled down for biophysical reasons. They lack a political vocabulary and an imaginary to express this contradiction on its own terms. This is the problem that the post-growth condition submits to critical sociology and to critical theory in general. ■

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> Degrowth:

A Call for Radical Socio-Ecological Transformation

by **Federico Demaria**, Institute of Environmental Science and Technology, Autonomous University of Barcelona, Spain



*The snail has become the symbol of the Degrowth movement.
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“Growth for the sake of growth” remains the credo of all governments and international institutions. Economic growth is presented as the panacea to all the world’s problems: poverty, inequality, sustainability, you name it. Left-wing and right-wing policies differ only on how to achieve it. However, an uncomfortable scientific truth has to be faced: economic growth is environmentally unsustainable. Moreover, beyond a certain threshold, it isn’t socially necessary. The central question then becomes: how can we manage an economy without growth?

This question is gaining legitimacy in different arenas, from science to politics. For instance, in September 2018, at the Post-Growth Conference at the European Parliament, over 200 scientists together with almost 100,000 citizens urged European institutions to act in their open letter titled “Europe, It’s Time to End the Growth Dependency.” This did not happen out of the blue. The debate has been lively for at least two decades, as seen from the over 200 academic articles, ten special issues, biennial international conferences with thousands of participants, summer schools, and even a master’s degree at our university in Barcelona. Our book *Degrowth: A Vocabulary for a New Era* was translated into more than ten languages. Important grassroots initiatives are taking place, from the opposition to environmentally destructive projects (with over 2,000 of them mapped in the Environmental Justice Atlas, e.g. the ‘Stop Coal. Protect the

Climate!’ campaign *Ende Gelände* in Germany), to the building of alternatives such as commons, solidarity economies, and co-housing. But what exactly do we mean by degrowth?

Generally, degrowth challenges the hegemony of economic growth and calls for a democratically led, redistributive downscaling of production and consumption in industrialized countries as a means to achieve environmental sustainability, social justice, and well-being. Degrowth is usually associated with the idea that smaller can be beautiful. However, the emphasis should not only be on *less*, but also on *different*. In a degrowth society everything will be *different*: activities, forms and uses of energy, relations, gender roles, allocations of time between paid and non-paid work, relations with the non-human world.

The point of degrowth is to escape from a society absorbed by the fetishism of growth. Such a rupture is therefore related to both words and things, to symbolic and material practices, to the decolonization of the imaginary and the implementation of other possible worlds. The degrowth project does not aim for another growth, nor for another kind of *development* (sustainable, social, fair, etc.), but for the construction of another society, a society of frugal abundance (Serge Latouche), a post-growth society (Niko Paech), or one of prosperity without growth (Tim Jackson). In other words, from the outset it is not an economic project, but a societal project that implies escaping from the



Literature on degrowth is available in many languages.
Photo: Federico Demaria.

economy as reality and as imperialist discourse. “Sharing,” “simplicity,” “conviviality,” “care,” and the “commons” are primary significations of what this society might look like.

Although it integrates ecological economics, degrowth is a non-economic concept. On the one hand, degrowth implies the reduction of social metabolism (the energy and material throughput of the economy), in order to face existing biophysical constraints (of natural resources and the ecosystem’s assimilative capacity). On the other hand, degrowth is an attempt to challenge the omnipresence of market-based relations in society and the growth-based roots of the social imaginary, replacing them with the idea of frugal abundance. It is also a call for deeper democracy, applied to issues which lie outside the mainstream democratic domain, such as technology. Finally, degrowth implies an equitable redistribution of wealth within and across the Global North and South, as well as between present and future generations.

Over the last couple of decades, the face of the triumph of a single-thought ideology of growth has been no other than that embodied by the seemingly consensual “*sustainable development*” slogan, a nice oxymoron. Its aim was to try to save the religion of economic growth in the ecological crisis and it seemed to be well accepted by the anti-globalization movement. It became urgent to oppose the capitalism of a globalized market with another civilizational project or, more specifically, to give visibility to a plan that had been in formation for a long time, but progressed underground. The rupture with developmentalism, a form of productivism for the use of so-called developing countries, was thus the foundation of this alternative project.

The term “degrowth” was proposed by political ecologist André Gorz in 1972, and was used as the title of the French translation of Nicholas Georgescu-Roegen’s essays in 1979. Degrowth was then launched by French environmental activists in 2001 as a provocative slogan to repolit-

icize environmentalism. The motto of degrowth was almost accidentally launched by a pressing need to break with the doublespeak, and often meaninglessness, of *sustainable development*. Thus the phrase is not originally a concept (at least not symmetrical to economic growth) but rather a defiant political slogan aimed at reminding us of the meaning of limits. Degrowth is neither recession nor negative growth and should not be interpreted literally: degrowing to degrow would be as absurd as growing to grow.

A degrowth transition is not a sustained trajectory of descent, but a transition to convivial societies that live simply, in common, and with less. There are several ideas about the practices and institutions that can facilitate such a transition and allow such societies to flourish. The attractiveness of degrowth emerges from its power to draw from and articulate different sources or streams of thought (including justice, democracy, and ecology); to formulate strategies at different levels (including oppositional activism, grassroots alternatives, and institutional politics); and bring together heterogeneous actors who focus on different issues, from agroecology to climate justice. Degrowth complements and reinforces these topic areas, functioning as a connecting thread (a platform for a network of networks) beyond one-issue politics.

In fact, degrowth is not *the* alternative, but rather a matrix of alternatives that reopens the human adventure to creativity and a plurality of destinies, by lifting the lead blanket of economic totalitarianism. It is about exiting the paradigm of *homo oeconomicus* or Marcuse’s one-dimensional man, the main source of planetary homogenization and the murder of cultures. If “development” is no longer the organizing principle of social life, there is space for a pluriverse. This would be “a world where many worlds fit,” as the Zapatistas say. Degrowth is just one among a multiplicity of worldviews that are alternatives to development, such as Buen Vivir, Afrotopia, and Swaraj. In our new book *Pluriverse: A Post-Development Dictionary*, we have collected over a hundred of them, from all over the world. It is therefore not possible to formulate “turnkey” solutions for degrowth, but only to outline the fundamentals of any non-productivist sustainable society and concrete examples of transitional programs.

The degrowth hypothesis posits that a trajectory of radical socio-ecological transformation is necessary, desirable, and possible. The conditions of realization and political questions that concern the social dynamics, the actors, the alliances, the institutions, and the processes that will create degrowth transitions remain open and are actively debated in Europe and beyond. The time is ripe not only for a scientific degrowth research agenda that asks inconvenient questions, but also for a political one. As ecological economists Tim Jackson and Peter Victor argued in *The New York Times*: “Imagining a world without growth is among the most vital and urgent tasks for society to engage in.” ■

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> Feminisms and Degrowth

Alliance or Foundational Relation?

by **Anna Saave-Harnack**, University of Jena; Germany, **Corinna Dengler**, University of Vechta; Germany, and **Barbara Muraca**, Oregon State University, USA

The term “degrowth” might lead many to think of shrinking economies following the financial crisis of 2007. But this is not what degrowth is about. The activist slogan “their recession is not our degrowth!” clarifies that degrowth as an academic discourse and a social movement is not to be misunderstood as a description of negative growth within a growth paradigm (i.e. a recession). Rather, degrowth fundamentally questions this very paradigm and emphasizes the need to liberate societies from their dependence on the dictate of economic growth. This means that degrowth seeks and spells out possibilities for modern societies to reproduce without having to rely on constant acceleration, expansion, and the intensification of social and ecological exploitation. As concrete utopia, degrowth activism and scholarship envision a bottom-up transformation to a socially just and environmentally sustainable society, and suggest possible steps towards this bigger vision, from alternative collective practices to the transformation of basic institutions. Therefore – and this is another activist slogan – when talking about degrowth, we refer to “degrowth by design, not by disaster!”

And yet, if we look at the enforced economic degrowth in Greece, there are things that we, as degrowth scholars and activists, can learn. The declining growth rates following the financial crisis in Greece led to major societal challenges regarding social and public services. A de-growing economy meant that the civil society had to cope with austerity policies as a reaction to public debt. Hospitals, kindergartens, and neighborhood communal networks were created to alleviate the consequences of reduced public expenditure. Many of these initiatives arising from the manifest consequences of the economic crisis (i.e. degrowth by disaster), such as the solidarity clinic in Thessaloniki, do resemble idea(l)s that degrowth would want to construct “by design.” But they also speak to a well-founded feminist concern: in the Greek case especially, women were negatively affected by the crisis as they filled the gap created by austerity policies. While slightly more traditionally male

jobs were lost, women shouldered the larger part of formerly public services especially in the realm of care work and activities related to social reproduction. The example of Greece could lead feminists to conclude that degrowth by disaster, but possibly also by design, can be very risky for women and likely to contribute to a re-traditionalization of social reproduction and care work. This feminist concern is further reinforced by scholarship outlining a degrowth path that does not call for a radical transformation of basic social institutions such as labor and a renegotiation of the conditions essential to a good life for all. Against this rather conservative understanding of degrowth, more radical perspectives, such as the lively discussion within the “Feminisms and Degrowth Alliance” (FaDA), highlight the emancipatory potential of a degrowth society, when built on guiding principles inspired for example by feminism in its different forms and traditions.

There have been intense discussions between feminist activists, scholars, and environmentalists long before the degrowth discourse gained momentum. For example, the subsistence perspective, developed in Germany in the 1980s, emphasized the interconnection between environmental concerns and the exploitation of women and colonies. The 1997 special issue of *Ecological Economics* on “Women, Ecology and Economics” was another milestone in this endeavor. While this dialogue is increasingly being considered by degrowth advocates, feminist reasoning is still not an integral part of the degrowth proposal.

We argue that degrowth still has much to learn from feminist traditions; feminist contributions are essential for achieving the just and solidarity-oriented social-ecological transformation that degrowth envisions. First, a core insight of ecological feminism is that “nature” (which in the Western tradition of thought is constructed as “female”) and “social reproduction” (which is assumed to occur “naturally”) are the very basis of every production process in capitalist economies. Yet, within the capitalistic growth paradigm both are structurally devalued, made invisible,

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“Feminist contributions are essential for achieving the just and solidarity-oriented social-ecological transformation that degrowth envisions”

and destroyed on a daily basis. Degrowth needs to take into account the parallel exploitation and devaluation of social and ecological reproduction and make them a key component of its struggle in order to bring about more sustainable human-nature relationships. Second, feminist theory long ago unveiled the power relations embedded in the growth paradigm. For example, Maria Mies' 1986 account of the relationship between patriarchy and “the paradigm of never-ending accumulation and ‘growth’” shows that a cross-fertilization between feminist and degrowth movements is not only possible but essential in order to fully address structures of oppression in capitalism. Third, feminism has articulated theories and supported practices of organizing care as a commons, against the reallocation of care to families or the private sector that economic shrinking without transformation inevitably brings about. Amaia Pérez Orozco's account of the “sustainability of life” offers a valuable starting point for envisioning care in a degrowth society. A “commonization of care” would also support individual, often female caregivers, and provide a social place for caregivers to meet, exchange, and develop a political voice, as pointed out for example by Silvia Federici. This way of organizing care work could serve as inspiration for a wider range of degrowth practices.

Although much is to be gained by fostering dialogues between feminism and degrowth, there are also challenges to such an endeavor. Some strands of feminism may be less likely to participate. Even among the most likely conversational partners – ecological feminism and degrowth – the different terminologies they rely on might cause a mutual lack of understanding.

Moreover, given the real and felt urgency of the accelerating ecological disaster, interventions risk neglecting the implications for more vulnerable social groups, including those who typically carry out social reproduction. As Federici has recently (2018) shown, we are faced with an alarming increase worldwide of violence against women, especially those in charge of holding local communities together through subsistence, indigenous knowledge, and care. The violence is spearheaded by a renewed wave of global “enclosures” under the neoliberal crusade to secure growth for the elites. This is why it is of utmost importance for degrowth activism and scholarship, even in the face of time pressure, *not* to fall into the trap of playing down the challenge of patriarchy which, as we have pointed out earlier, is closely tied to the capitalist growth paradigm.

The challenge of making feminism an integral part of the degrowth movement is reflected by the lively discussion in the FaDA network. Some members argue that instead of trying to build an alliance between the two discourses and movements, thereby framing their relation as a mere possibility and highlighting differences in the common struggle, there should be a focus on the foundational relation of the two. A radical transformation of society beyond the growth paradigm can only be achieved by addressing the capitalist growth dictate and its deep patriarchal roots in conjunction. Integrating feminism and degrowth is a project in the making to which we are all invited. It is our duty to engage in the global dialogue to create a feminist degrowth society! ■

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> Challenges for a Degrowth Strategy

The Case of Greece

by **Gabriel Sakellaridis**, University of Athens, Greece



Let Greece Breathe demonstration in London, 2015. Sheila/flickr. Some rights reserved.

It is considered axiomatic in capitalist economies that economic growth is essential for a country to ensure prosperity for its citizens. The allure of growth, however, should not be understood as merely a set of dominant ideas prevalent in public discourse and scientific paradigms. The deification of growth is not simply a matter of “growth ideology” enforced by powerful academic elites and vote-seeking politicians. On the contrary, this “growth ideology” should be seen as the outcome of powerful laws governing the capitalist mode of production, according to which competition, capital accumulation, and profit maximization reside in its genetic code.

The growth imperative has been contested by the idea of degrowth, which emerged with the growing concern for environmental peril. Degrowth can be defined in a nutshell as an “equitable downscaling of production and consumption” in a socially and ecologically beneficial manner. In juxtaposition to the growth imperative, degrowth theorists and activists argue that there are specific social constraints to growth, set by the scarcity of natural resources, climate change, the length of the working day, the quality of life, and several other factors. GDP is considered a misleading indicator of prosperity, since it misses a number of important variables that are not expressed in monetary terms and, moreover, binds society in a race to productivism and consumerism.

In light of the recent global slump that followed the financial crisis, the international production model has been disputed. While economists have questioned it mostly in terms of global current account imbalances, there have been incremental critiques stemming from the “degrowth camp,” approaching the crisis as an opportunity to reorient social priorities away from the quest for growth.

Greece has been at the epicenter of public debates concerning the impact of the imposed austerity, as the country experienced one of the deepest recessions in advanced capitalist countries since the Great Depression; it lost 28.1% of its real GDP from 2008 to 2017, while unemployment skyrocketed from 7.8% to 21.5% in the same period (peaking at 27.5% in 2013). The economic crisis sunk the country into a deep social crisis, reflected also at the political level in the form of a deep representation crisis where entrenched political identities and party affiliations collapsed, while new were shaped.

Given the social setting, the crucial question is whether a sustainable and deliberate degrowth strategy could have proved fertile. If not, as argued here, it is important to highlight what the key mechanisms were that rendered it so difficult. The challenges for degrowth should not be considered reasons to reject its agenda, but on the contrary, should be seen by degrowth theorists as hurdles to overcome in order to strengthen the foundations of their strategy.

As will become evident in the following two paragraphs, both the Troika policy prescription and the left alternatives rotated around the axis of growth and therefore the whole public debate evolved around the growth imperative.

The strategy adopted by the Troika attempted to promote an investment and export-led growth for the Greek economy, advancing the prescription of internal devaluation and

structural reforms of the labor and product markets, and targeting the real exchange rate as a strategy to promote competitiveness and put the Greek economy into a virtuous cycle. The results, however, proved a disaster for the vast majority of the Greek people.

The alternative routes proposed by the left to the Troika policy were twofold. On the one hand, those who advocated that Greece should remain in the Eurozone but resided in the “anti-austerity” camp proposed a new “Marshall Plan” that would raise public investment, as well as aggregate demand management that would boost private consumption and investment. In combination with a restructuring of the Greek public debt, this strategy would ensure its sustainability and yield jobs and income through Keynesian mechanisms. On the other hand, the proponents of Grexit claimed that adopting a new national currency nominally devalued against the euro would raise exports and diminish imports, leading to a combination of export-led growth and import-substitution mostly based on manufacturing.

The first challenge to the development of a solid degrowth narrative in Greece emanates from the public debt sustainability and its relation to output growth. From the moment that Greece was confronted by a public debt solvency crisis, debt sustainability became the goal of the pursued policies, at least rhetorically. The key variables for public debt sustainability are fiscal primary balances and the relationship between interest rates on government bonds and nominal output growth rates. If the nominal growth rate is less than the interest rate, the so-called “snowball effect” is triggered, raising public debt, even under a primary surplus. Output growth then becomes the most crucial variable for public debt sustainability. Under such pressing circumstances, proposals for a “degrowth” strategy have little appeal.

The second challenge originates from the financialized form of contemporary capitalism and is associated with debt deflation, which ensnares an economy into a “private debt-recession” vicious circle. Capitalist economies are money-production economies, and the balance sheets of their units are interlinked through a complex financial network. Under the presence of excessive private debt, a recession raises the debt burden, leading to a debt deflation.

The third challenge is associated with unemployment and its concomitant social costs. It is needless to argue that an unemployment rate that peaked at 27.5% in 2013, when it was 7.8% in 2007, shook the foundations of Greek society, and also posed significant political risks.

Given that employment bears a strong positive correlation to economic growth, the policy agenda in Greece has inevitably been tied to a growth strategy, with the pressure to address high unemployment in real political time causing path-dependency to prevail. In other words, since there was no preparation for a degrowth strategy able to create new jobs, the “business-as-usual” paradigm dominated public debates, i.e., higher growth – more jobs.

The fourth challenge stems from the fact that a capital inflow-starving economy, like the Greek one during the recession, lowers its environmental standards significantly to attract investments. The new legislation on fast-track investments has been a validation of the above tendency. There are numerous investment examples that would have raised social resistance before the crisis, but nowadays are deemed socially legitimate. These include the new extractivism projects, including new gold mines at Chalkidiki in Northern Greece, or the exploration contracts that the Greek government has signed with oil companies for the exploitation of oil and natural gas reserves in the Ionian and Cretan seas. Another example of this thirst for growth is the concession of the former Athens airport at Elliniko, which the current government had committed to converting into a metropolitan park, to an enormous real-estate plan under pressure from foreign and domestic investors.

The economic nature of the challenges that a “degrowth agenda” has to counter does not entail an acceptance of economism. It does, however, pose specific constraints that need to be well understood because of their importance in a “growth economy.” Avoiding them as “facets of economism” simply ignores reality and weakens possibilities for a degrowth strategy.

At the same time, it would not be fair to argue that alternative methods of organizing production or questioning the consumption pattern did not emerge in Greece during the crisis. On the contrary, a number of such initiatives were born, albeit at a local level, including time banks, urban gardening, “no-middlemen” networks for agricultural goods, and even self-management business ventures. Nevertheless, these initiatives were often fragmentary and could not comprise a viable alternative, especially under the pressing conditions of a deep recession. They do, however, encapsulate the seeds of a counter-paradigm of social organization, ideologically questioning the dominant perception of social needs and reorienting them toward environmental preservation and economic democracy. They confront economism and put social needs at the center of production and consumption patterns. ■

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> Chile:

From Neoliberalism to a Post-Growth Society?

by **Jorge Rojas Hernández**, Universidad de Concepción, Chile



To further change, practical as well as utopian ideas are needed.
Times Up Linz/flickr. Some rights reserved.

In its relatively short history, Chile has undergone various economic, social, cultural, and political regimes. Some governments promised reforms or revolutions, but in doing so caused ever deeper conflicts. The Frente Popular government, a center-left alliance, took over in 1938 but did not last long. In 1964, Eduardo Frei Montalva won the presidential election as the candidate of the Christian Democratic Party. His government program, a “Third Way” as an alternative to socialism and capitalism, was characterized by structural reforms and a strong politicization of society. The most important goal was an agrarian reform.

From 1970 to 1973, Salvador Allende was in power, heading the well-known popular government of the Unidad Popular, an alliance of socialists, communists, and other small leftist parties. He nationalized the main economic sectors (banking, agriculture, copper mining, and major industries). Allende’s government was the result of the “Long March”

through the Chilean state apparatus to gain more equality and justice for the working class and other poorer social strata of society. As well as a paradigm of progress, his reforms were part of the emancipatory political conception of the sixties. Unfortunately, in 1973 this experiment in democratic socialism ended dramatically with a military coup.

Together with neoliberal economists, the military dictatorship then implemented a radical policy of privatization. Their intention was not just to change the economic model, but to transform Chilean society and to develop a new social and cultural model: a neoliberal and market-oriented society, a depoliticized and individualized society, principally consumer-oriented, in which growth and competition were established as the “justified” means for individual progress and happiness. The state was to increasingly withdraw from the economy and its social functions. This paradigm continued during the democratization process of the 1990s.

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This policy of privatization and individualization necessarily led to a loss of meaning and fears for the future among broad sections of the Chilean population. As a result, protest and civil movements such as the 2006 protest of the “Penguins,” a student movement demanding better public education, came into existence. This was followed in 2011 by a massive student movement demanding free university education. Both movements left their mark on subsequent government programs. These processes of change are difficult and slow, but ultimately they have had positive political and societal impacts.

At the beginning of the 21st century, the current models of development seeking to explain today’s social-ecological, climatic, and institutional crises seem to be definitively exhausted. But still, in industrial societies, an instrumental rationality dominates, that separates human activity – decidedly productive in the Global North and extractive in regions of the Global South – from nature, resulting in profound changes in ecosystems, the climate, and social life. And newly launched neoliberal ideologies of progress and growth, fueled by aspirations for modernization and the new paradigm of globalization, are now crossing the ecological boundaries and socially acceptable limits of planet Earth. This development does not stop at Chile’s borders. Today we are far from an ecologically and socially responsible and sustainable social system.

The changes introduced violently by the coup in Chile are being experienced in many countries today in the form of slow but steady neoliberal processes of change linked to globalization. The Chilean neoliberal model of the 1980s showed us very early that the externalization of production leads to a more flexible working environment and the formation of a new precariat. Globalization processes work in a similar way today. Added to that is the impact of the new technological revolution (4.0) that has just begun, with its projected enormous loss of jobs all over the world. Environmental crises and climate change are also forcing us to think about how work will be affected by environmental damage and increasing disasters caused by climate change. All these factors result in social disintegration and new inequalities. As a result, citizens’ dissatisfaction is growing. This lack of social inclusion, visible in many countries, currently threatens established democracies and individual and civil rights, and can ultimately contribute to the destruction of societies. But social and environmental movements in many parts of the world – including Chile and across Latin America – are being established, demanding not only solutions to concrete problems but more citizen-friendly reforms for a better future.

Do the crisis of neoliberalism and the current growth model lead to the emergence of new post-growth models? The worrying right-wing populist tendencies observed in several countries seem to point in a different direction. They form

an opposing force to the already initiated socio-ecological and liberal transformation processes. But it could well happen that the current social and environmental movements that emerged as a response to the current crises as well as in opposition to right-wing populist policies will grow stronger and be consolidated. For example, in the last presidential and parliamentary elections in Chile, a new left-wing alliance participated, the *Frente Amplio*. In less than two years of existence, it recorded 20% of the vote and is now represented in parliament. In contrast to the traditional left, this group embodies new conceptions of politics, society, and nature.

However, other interesting phenomena are also currently emerging: Chile today is one of the leading countries in the development of new alternative forms of business, the so-called “*Empresas B*” (“B corporations” or “benefit corporations”), which are launched by a young start-up generation with high social and ecological awareness. Their market share is constantly increasing. By now, throughout Latin America, adapted international certification models take into account factors such as environmental and social sustainability, innovation potential and the quality of work in a company. This new dynamism leads to the emergence of new working cultures and lifestyles.

By the end of 2017, there were 450 certified “*Empresas B*” across Latin America, 130 of them in Chile. They are part of a new Global Movement B and a *Sistema B* of business models based on social-ecological ethics. Their efficiency can be assessed by indicators such as public welfare, a sustainable way of dealing with existing ecosystems, a commitment to recycling and bio-economy as well as to new forms of cooperation. In this way, national *Sistemas B* are formed and the so-called *Academia B* supports them with scientific research. Chile is currently promoting this development through programs of the Ministry of Economy, Development, and Tourism’s Production Development Corporation (CORFO) and others, with the goal of training people and creating skilled jobs.

At the end of 2018, more than 1,000 people from 30 countries participated in the First World Meeting of Movement B in Puerto Montt, Puerto Varas, and Frutillar in southern Chile. These kinds of initiatives are the result of the cultural and political changes of the past decades. Today’s younger generation appreciates above all values such as independence, freedom, grassroots democracy, creativity and initiative, respect, tolerance, solidarity, and ecological awareness.

It is to be hoped that these new, sustainable approaches that can be observed in Chile will continue to gain political backing and will be reflected in future government programs and political constellations. ■

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> Ecofeminist Sociology

as a New Class Analysis

by **Ariel Salleh**, University of Sydney, Australia and member of ISA Research Committees on Environment and Society (RC24) and Social Movements, Collective Action and Social Change (RC48)



Ecological feminist analyses grow out of everyday life praxis, so they often question the taken-for-granted premises of social movements framed top-down by established political ideologies. For example, during the 1980s and 1990s, ecofeminists contested a lack of sex-gender awareness in the philosophy of “deep ecology.” It was not that the environmental aims of the program were rejected by ecofeminists; rather, as they argued, the planetary crisis had its origins in the rapidly globalizing system of capitalist patriarchal institutions and values. For this reason, crisis solutions must change “the culture of masculinist entitlement” supporting that system. This controversy, known as the “ecofeminism/deep ecology debate” ran for over a decade in the US journal *Environmental Ethics*. In a similar consciousness-raising exercise, ecological feminist theorists have engaged critically with Marxist scholarship. In the past decade, articles in *Capitalism Nature Socialism*, the *Journal of World-Systems Research*, and elsewhere, have broadened the public

understanding of ecofeminism as a critical sociology. My position is that the contemporary global conjuncture calls for a new sociological *class* analysis. So what follows is a brief outline of the historical trajectory and claims of what I label “an embodied materialism.”

> An embodied materialism

Reproductive labor is the foundation of every society. In the hands-on experience of such labor, mothers learn how to sustain biological cycles in the bodies they care for. Likewise, peasants and gatherers attune to and regenerate cycles in the land. These non-monetized workers are largely invisible in the global economy, not adequately acknowledged in sociology, nor theorized in Marxism. But it can be argued that together these three labor groupings – mothers, peasants, and gatherers – form a *class* whose time has come, by reason of their material skills in enabling life-on-Earth.

The word ecological feminism is used widely to describe a politics that treats ecology and feminism as one struggle. It emerges when the conditions of life in urban neighborhoods and rural communities are at risk. Women or men can be involved in life-affirming labors, but since it is mainly women around the world who are socially-positioned as caregivers and food growers, it is usually the women of a community who take environmental action first. Interventions of this sort are universal, regardless of region, class, or ethnicity; that is to say, they are uniquely intersectional. On every continent from the 1970s on, women responding to the collateral damage of post-World War II capitalist consumerism and development models started doing what they called “ecofeminism.” Whether opposing toxic pollutants, deforestation, nuclear power, or agroindustry, their politics always connected “local” and “global.” German ecofeminists like Maria Mies even built their work quite explicitly on Rosa Luxemburg’s socialist contribution.

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An example of how “meta-industrial labor” achieves economic sufficiency with ecological sustainability. Photo: Ariel Salleh.

The 1980s also saw the rapid rise of “new social movements” — anti-nukes, Black Power, Women’s Lib, Indigenous land rights — and Marxists were right to be skeptical. Radical ecology would be coopted by Green parties and technocratic professionals. Feminism was deflected by liberal individualism, and turned into a single-issue negotiation with the state for equal rights. The next phase of ecofeminism followed the 1992 United Nations Earth Summit, which intensified the Global North’s neocolonial policies in the name of protecting nature. Now a worldwide master plan of regional agreements opened the way for corporate mining of Indigenous soils and corporate patenting of Indigenous medicinal plants. Ecofeminists like Vandana Shiva and others were present at the Rio Earth Summit, and did what they could to oppose the measures. Soon, as recorded by Peruvian sociologist Ana Isla, the UN Framework Convention on Climate Change would force further concessions from the powerless. The twentieth century closed with the Battle for Seattle, where an international grassroots insurgency faced down the World Trade Organization. This broad movement of movements for a people’s alternative to globalization held its first World Social Forum in 2001.

> Globalization : decolonization

The expansion of neoliberal free trade demoralized the proletariat in metropolitan states by sending their jobs offshore to low-wage export processing zones in the Global South. But many folk in the geopolitical periphery had a positive agenda — a decolonizing one. In Brazil, a vibrant Landless People’s Movement was talking about eco-villages and food sovereignty. In Ecuador, the women of Acción Ecológica invented the concept of “ecological debt” to describe the 500 year-long colonial theft of natural resources; the modern theft constituted by World Bank interest on development loans; and the ongoing degradation of livelihoods resulting from economic extractivism. Justice with sustainability was also featured at the 2010 Cochabamba People’s Climate Summit, which presented Andean ways of provisioning as an alternative to the wasting of life under manufactured affluence. The equation of industrialization with progress was under interrogation.

Following the 2008 financial meltdown, globally aware youth started the Occupy movement, setting up camp near the Wall Street stock exchange to rail against the capitalist class; in Germany, they blockaded the Frankfurt banks. Another politics based on life-affirming “reproductive values” surfaced in Mediterranean states resisting European Union austerity programs. Spain’s *indignados* initiated a variety of self-sufficient neighborhood economies. At Rio+20 in 2012, business groups, politicians, and the UN Environment Program stepped up their Green New Deal proposition — a PR exercise for the nanotech bio-economy; and again, ecofeminists challenged them. Later, academics would gather in Leipzig and Budapest to discuss degrowth, although the post-development vision of ecofeminist subsistence thinkers like Veronika Bennholdt-Thomsen was not yet recognized. Today, the Rosa–Luxemburg-Stiftung is examining the convergence of ecofeminism and other community-oriented politics like *buen vivir* from South America, *ubuntu* from South Africa, and *swaraj* from India.

Ecofeminists have an extensive literature, often taught in universities, and one that notes how under capitalist patriarchal culture, the enclosure and commodification of nature echoes the enclosure and commodification of women’s laboring bodies. Traditional allusions to Mother Nature are far more than a metaphor. As Greta Gaard points out, a compassionate ethic of veganism now circulates among ecofeminist networks and regular international meetings on Minding Animals are held. Women across Africa whose livelihood is threatened by mining near their villages have set up WoMin, a continental anti-extractivist network with its own ecofeminist manifesto on climate change. Appalachian mothers in the USA organize direct action against mountaintop removal by the coal industry. India’s Navdanya School for eco-sufficiency “banks” traditional seeds to save them from pharmaceutical patenting. In Sichuan, China, peasant women restore soil fertility by reviving centuries-old organic techniques. And in London, housewives volunteer their time to repair the River Thames catchment from centuries of abuse.

> Anthropocentrism : ecocentrism

When activists or, say ISA RC48 sociologists, don’t see how the logic of reproduction interconnects ecology, workers’, women’s, and Indigenous movements, a destructive single-issue “identity politics” happens, where the rights of one group are pitted against another. This restricted sociological imagination is an expression of the anthropocentric Western dualism of “humanity” versus “nature,” a traditional “common sense” that is re-enacted with the socialization of every new generation.

Unfortunately, the wheels of globalization are still greased by Aristotle’s “Great Chain of Being” hierarchy, an ancient discursive rationale placing gods, kings, and men at the apex of social life, having power over underlings like

women, natives, and nature. The old Aristotelian mantra has structured the direction of history such that over the centuries, women and conquered slaves would become mere objects. Eurocentric institutions, from religion and law, to economics and science, were designed to serve that “masculinist entitlement” — the ongoing international default position for liberals and socialists alike. As ecofeminist historian of science Carolyn Merchant observes, Enlightenment reason conceptualized bodies and nature as machines with parts to be controlled by mathematical formulae. This life-alienated culture is indispensable to the functioning of capitalism and it is maintained in sociology by some ISA RC24 ecological modernists who believe that technological innovation can save the environment. However, the automated future will not readily “dematerialize” into either sustainability or justice. So too, gestures like the circular economy or the transvaluation of care labor by feminist economists are reabsorbed by the logic of capital.

In a time of ecological crisis, people need to be able to think inside an eco-centric framework. When this presents teachers of sociology with a challenge, radical students as often as not move across to political ecology or even human geography. But modernist professionals can learn much from the eco-centrism of Indigenous epistemologies and analyses based on women’s experiences of organic caregiving labor.

The discourse of “humanity” versus “nature” has prevented the Left, and particularly postmodern feminists, from taking this marginalized reproductive labor force seriously as political actors. The usual Left charge is that ecofeminists attribute women’s political insights to an in-born “feminine essence” — which is plain nonsense. The source of ecofeminist perceptions is neither biological embodiment, nor economic structures, nor cultural mores, though all these things influence human action. Rather, an ecofeminist epistemology is grounded in labor: in the making and re-making of understandings and skills through interaction with the living material world. People who work autonomously, outside of numbing industrial routines — caregivers, farmers, gatherers — are in touch with all their sensory capacities and able to construct more accurately resonant models of how one thing relates to another.

> Regenerative labor

The time frame of this eco-centric labor *class* is intergenerational, and thus intrinsically precautionary. Scale is intimate, maximizing worker responsiveness to matter-energy transfers in nature or in human-bodies-as-nature. Judgment is based on an expertise built up by trial and error, using a cradle-to-grave assessment of ecosystem or bodily health. The diverse needs of species or age groups are balanced and reconciled. Where domestic and livelihood economies practice synergistic problem-solving, multi-criteria

decision-making is a matter of common sense. When there is no division between mental and manual skills, then responsibility is transparent; the labor product is not alienated from the worker as under capitalism, but enjoyed in sharing with others. Here the linear logic of production gives way to a circular logic of reproduction. In fact, social provisioning in this way is simultaneously vernacular science and direct political action.

Ecological feminism argues for a synergistic politics, fostering livelihoods, skilled jobs, solidarity, cultural autonomy, sex-gender awareness, learning, empowerment, and spiritual renewal. A current exemplar can be found in Ecuador among the mothers and grandmothers of the development-ravaged hills of Nabon. With foresight and creativity, these self-governing women have achieved erosion control, water harvesting, soil fertility, and food sovereignty by planting to restore old water catchments and streams. In this, they have also done their bit for the global climate crisis. So too, the international peasant union Via Campesina insists, “our small-scale provisioning cools down the Earth.”

Reproductive work creates relational “ways of knowing” that counter the mechanistic violence of Western instrumental reason. Unless radical politics is guided by care labor, it will readily slip back into the kind of Enlightenment that treats the Earth and its peoples as an endless resource for the growth economy. Whereas the linear reason of modern industry cuts through the metabolism of nature, leaving disorder and entropy behind, meta-industrials who nurture living processes develop tacit epistemologies expressing an alternative form of human creativity. Such labor, freely appropriated by capital from both its domestic and geographic peripheries, is in fact the prerequisite of capitalism’s mode of production. That is to say, this unique *class* of workers exists “inside of capitalism” when its activity subsidizes surplus value; yet reproductive provisioning also exists “outside of capitalism,” sufficient to itself. My term “meta” implies a fundamental frame, which holds subsidiary activities in place.

Eco-sufficient economies do not externalize costs by exploiting the bodies of others, nor do they externalize waste as “pollution.” That regenerative labor skill is indispensable to a sustainable global future and the remarkable fact is that it is already practiced by the worldwide majority of workers. This recognition accords great strategic power to the meta-industrial *class* as a historical actor in the international political arena. The classical socialist preoccupation with exploitive “relations of production” — critically important as it has been — sidelined concern over oppressive “relations of reproduction.” That said, there are passages in Marx’s writing which might well have described the “meta-industrial labor *class*,” had his humanist focus been less narrowly patriarchal and Eurocentric. ■

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> Brazil 2018:

The Middle Classes Shift Right

by **Lena Lavinas**, Federal University of Rio de Janeiro, Brazil, and **Guilherme Leite Gonçalves**, Rio de Janeiro State University, Brazil



Since February 2018 heavy military and police presence has become a normal part of life in the streets of Rio de Janeiro. Photo: EBC - Empresa Brasil de Comunicação/Agência Brasil. Creative Commons.

In Latin America, the 1980s brought the end of the military dictatorships, which had stifled the forces of social change for decades. But while transition to democracy expanded the formal circle of citizenship, it also saw economic crises and elite pacts.

In Brazil, the *slow, gradual, and safe* transition heralded by the second-to-last military president, Ernesto Geisel, contained these contradictions. The Amnesty Law, a deal struck between political and economic leaders and the armed forces, left out torture victims and the families of the disappeared. In countries such as Argentina, Bolivia, Chile, Guatemala, Peru, and Uruguay, similar deals were struck down, leading to the imprisonment of torturers and, in some cases, of former heads of state. In Brazil, the Truth Commission (2011-14) tried to enshrine the memory of state violence in policy, but its recommendations have remained a dead letter.

Despite its limitations, Brazil's re-democratization created space for greater political participation. The middle classes played a fundamental role in reorganizing civil society, fighting for anti-racist, feminist policies. They were also crucial during the Constituent Assembly of 1987, and decisive in the elections that followed the end of the dictatorship.

In 1989, the middle classes favored the Workers' Party (PT) nominee for president, Luís Inácio Lula da Silva, while the victorious candidate, Fernando Collor de Mello, represented continuity for the elites benefited by the military regime. When corruption allegations against Collor emerged, middle-class sectors mobilized massively in 1992 in favor of impeaching Brazil's first neoliberal president.

In the 1990s, the middle classes continued to support Lula, who lost to Fernando Henrique Cardoso in 1994 and 1998. In 1994, the majority of

Lula's votes came from those earning between two and ten minimum wages, and from the most educated voters. Cardoso's strongest support came from both extremes of the income spectrum. In 1998, Cardoso won a majority across all income brackets, performing particularly well among the least educated. Lula, meanwhile, continued to perform strongly among the most educated.

The Cardoso era was characterized by policies of monetary stability, full-bore privatization, and fiscal austerity and it led Brazil into a recession. The profound restructuring of the economy placed the middle classes in a vise, pressured by the shrinking of traditional occupations, the sputtering of the import-substitution model (which had expanded technical and bureaucratic positions), wage losses, and the lack of good job opportunities.

Loss of social status turned into middle-class support for Lula in the 2002 elections, with their votes bringing to power the first worker to become president of Brazil. By 2006, middle-class support for Lula began to wane. That downward trend would steepen in 2010 and 2014, when the Workers' Party's nominee was Dilma Rousseff (who won both elections). Slowly but surely, middle-class voters were shifting to the right.

> Pro-market expansion in the Lula/Dilma era

Lula ascended to the presidency in 2003 amidst an economic slowdown and shrinking growth, despite the monetary stability achieved by the “Plano Real.” The country’s much-lauded victory over inflation failed to reduce poverty and inequalities and promote upward social mobility for the middle class.

The economic recovery in Lula’s first term (2003-06) grew more robust in his second (2007-10). Initially, the boom in commodity prices favored exports and drove growth. These were years marked by a significant expansion in formal employment and a rise in average income. The minimum wage saw real gains of over 70%, far above inflation.

In parallel, poverty-fighting programs ensured a modest, but steady benefit to 14 million families. Access to new lines of credit also made possible an extraordinary process of financial inclusion. The success of the world-famous “Bolsa Família” program stemmed precisely from the steep uptick in the degree of monetization of the most vulnerable sectors of society, which were ushered in to the mass consumer market.

At the same time, processes of privatization were taking place. The privatization of healthcare, alongside the underfinancing of public healthcare, saw an astonishing rise in demand for private plans. In higher education, students increasingly shifted from public to private institutions: by 2015, 75% of students were in private institutions. Student loan debt figures are eloquent: 51% have defaulted (on a sum of around USD 5 billion), and of that group, over half have no means of resuming payments.

The overvaluation of the *real* incentivized imports of manufactured goods at record levels, and ultimately sapped the return to industrial activity. One of the legacies of the Workers’ Party was the renewed centrality of the primary sector, spurred not only by higher global

demand for raw materials, but also by the governing coalition’s close alliance with agribusiness.

Economic growth began to wither in the first year of the Dilma administration (2011). The streets began to echo the dissatisfaction of the “new middle classes” – a term coined to suggest the end of hurdles to social mobility, allowing low-income sectors to consume like the middle classes. Then came June 2013, a spontaneous mass movement demanding better public transportation, healthcare, education, and housing.

To better understand this process, one must remember that while incomes had risen, and the prices of manufactured goods had dropped from 2006 to 2013, expenses on education, healthcare, day care, and elder care far outstripped average inflation and salaries. While easily available but expensive credit satisfied dreams of consumption, more and more fell prey to nightmarish debt, which swallowed up much of their disposable household income. Today some 63 million adults in Brazil are in default to the financial sector.

> The middle class and the far right

Sunk in debt, the middle classes have been disillusioned by the contradictions of successive stages of the pro-market expansion following re-democratization. Added to the depoliticization that characterized the boom days, this has placed them in a contradictory, volatile position vis-à-vis political platforms and made them ready to be kidnapped for the discourse of the far right.

The first element of this discourse is the call for a return to military dictatorship, praised as a better time in Brazilian history. This is encouraged by a policy of silence around the state violence of this period, thanks to the elite pact struck during re-democratization.

Further, the far right has recast social tensions in nationalist, chauvinist, and ethno-racially discriminatory

terms. It captures the insecurity of the middle class, brandishing enemies that it holds responsible for the state of society: the left, women, homosexuals, Blacks, Indigenous peoples, and all those who have risen to a previously inaccessible sociopolitical status. Through oppression of the “other,” it seeks to maintain the privileged position of those who have been socially downgraded by the market. Crucially, the far right also feeds off the middle class’s disillusionment with the Lula and Dilma administrations: “antipetismo” (anti-PTism) is the distillation of political and economic frustration into personal loathing and violence.

The hate speech of the right draws on the naturalization of violence against the poor and the working class as state policy, which translates into brutal numbers: since February 2018, when the army was called to intervene in Rio de Janeiro, the police or the military have killed one person every six hours. The targets are young Black men living in favelas. The appeal to fight violence with violence, despite the glaring ineffectiveness of such strategies, has become standard for middle sectors that see urban insecurity as a lack of state authority, to be remedied at any cost to society.

In the recent election, the victorious candidate of the far right, former army captain Jair Bolsonaro, held sway among high-income and middle-class voters with high school or college degrees, while Fernando Haddad, the Workers’ Party candidate, found support among the poorest and most uneducated, revealing just how far the positions on the political chessboard have been inverted. But now we can observe two new elements within Brazil’s political play which are closely akin. The first is related to Bolsonaro’s high performance obtained in all social segments. The second comprehends the increase of the indifference and disdain towards democratic rules among the very classes that were vital to Brazil’s re-democratization. ■

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> Populism, Identity, and the Market

by **Ayşe Buğra**, Boğaziçi University, Turkey



The recent currency crisis in Turkey shows how law violations in order to save the autonomy of the central bank can lead to serious harm to the economy.
Photo: Ayşe Buğra.

Since the 1990s, populism has been a widely used term to designate a new type of non-liberal ideology that characterizes certain political parties and their leaders in a wide variety of countries. A moral claim to exclusive representation — where the legitimacy of all opposition can be denied — appears as one of the core characteristics of populism and forms the basis of the disturbing observation that a democratically elected government can present a threat to democracy. However, the threat in question might not be clearly discernible in the discourse and political orientation of a populist party when it first comes to power; the characteristics generally attributed to populist politics often take shape in a dynamic process of gradual deviations from the norms and institutions of representative democracy. It might therefore be suggested that the nature of populism is better understood by approaching it as a process rather than as an ideology with a set of given features.

> The process of right-wing populism in Turkey

When the AKP (Justice and Development Party) came to power in Turkey in 2002, “conservative democracy” was the term its leaders used to describe its ideological position in an attempt to dismiss concerns about its Islamist past. The founders of the party had indeed had their political formation within the Islamist National Outlook Movement, and most of them had held important positions in the coalition government led by the RP (Welfare Party) which was shut down in 1997 for its anti-secularist orientation. Nevertheless, the AKP leaders’ claims that the party had left its Islamist position behind sounded convincing to many people in the country and abroad. The expressions of commitment to a market-oriented economic strategy were also reassuring for those who were ready to accept the AKP as a normal right-wing party.

Today, the AKP and its leader Erdoğan appear as a prominent example in de-

bates on the populist threat to democracy. This change of perception is related less to the surfacing of a hidden Islamist agenda than to the unfolding of an already present tendency to polarize society. This tendency was initially formed as a defensive argument against what was presented as an opposition consisting of authoritarian secularist forces alien to the cultural universe of the country and hostile to a government elected by its majority.

The AKP, like the RP in the 1990s, has drawn amply on the language of the politics of recognition to insist on the disadvantaged position of the country’s Muslim majority under the secular Republican rule. This was indeed a case of populist victors acting like victims and presenting the majority as a mistreated minority, as Jan-Werner Müller put it in his book *What is Populism?*. However, in the prevailing environment of the period, where identity politics was widely embraced across the divide between left- and right-wing politics, some also interpreted this element of the AKP’s



Photo: Ayşe Buğra.

discourse as a democratic call for the recognition of cultural difference against the contested universalism of the secularist position. Moreover, the AKP's approach to identity politics also extended to ethnic minorities, with promises to recognize and respect their hitherto denied cultural differences, at least at the level of discourse. For a while, this helped the party to enjoy the support of different segments of the population including left-liberal intellectuals and some Kurdish citizens.

It was only more than a decade after the formation of the first AKP government that it became possible to discern the problems inherent in the party's approach to group difference. While the recognition of cultural difference was presented as a central dimension of justice, the question of just representation was indexed to the legitimate monopoly of the elected party or its leader over the political representation of all groups.

> The use of identity politics by the right

In light of the recent political developments in Turkey, a question raised by Sheri Berman becomes relevant: "Why does identity politics benefits

the right more than the left?" As Eric Hobsbawm already warned in 1996 in an article published in *The New Left Review*, nationalism is the only form of identity politics that is based on a common appeal to the majority of citizens and "the Right, especially the Right in power, has always claimed to monopolize this." In the case of the AKP, the successful use of the language of identity politics has eventually unfolded into a form of nationalism where the opposition parties are presented as a threat to the national interest. This could be found illustrated, for instance, in the election campaign speeches before the general elections of 2015.

Along with the discursive change from the affirmation of cultural difference to a nationalistic language, there were also important institutional changes introduced successively after the three referendums held in 2007, 2010, and 2017. In fact, the case of Turkey shows how our age of populism is also an age of referendums. The current rise of populism and the globally observed salience of referendums as a form of political decision-making could both be interpreted as a reflection of a widespread popular discontent with representative democracy. As such, they both

foster similar concerns in liberal circles about a form of popular sovereignty unconstrained by a system of checks and balances. In Turkey, the referendums have indeed played a significant role in the gradual elimination of the bureaucratic and legal constraints on the executive and, ultimately, in the establishment of a presidential system where the elected president has immense decision-making powers.

Interestingly, the insertion of the country into the global market economy has remained an important factor limiting the use of absolute decision-making power by the elected ruler. The recent currency crisis in Turkey has shown how the violation of the rule of law and disregard for the autonomy of the central bank led to the erosion of investor confidence and caused serious harm to the economy. Since it is now becoming clear that the crisis cannot be managed simply through repeated references to the forces conspiring against the country, authoritarian populist politicians might have to acknowledge that their rule can conflict with the smooth functioning of a market economy. What kind of changes we can then expect in the realm of politics and economic policy is still uncertain. ■

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> Right-Wing Populism in Latin America

Self-Interest over Social Welfare

by **Ramiro Carlos Humberto Caggiano Blanco**, University of São Paulo, Brazil, and **Natalia Teresa Berti**, Universidad del Rosario, Colombia



Protests in Argentina. Photo: Ramiro Carlos Humberto Caggiano Blanco.

The commodities boom of the 2000s enabled the governments of Argentina and Brazil to adopt policies of re-industrialization combined with social integration. These governments re-nationalized strategic companies, partially (re-)regulated the labor market, promoted a minimum income, strengthened public education, and supported housing loans, among other measures that allowed the growth of the middle classes and the overcoming of poverty for large sections of the population. However, the economic revival and the attraction of significant investment flows maintained the highly concentrated character of these economies. The 2008 crisis made evident the fragility of the privileges acquired by the middle classes. The same year saw the emergence of the authoritarian and excluding claims of the *caceroleros* in Argentina and *paneleiros* in Brazil (pot-banging protesters), which

played an important role in the loss of support to Cristina Fernández de Kirchner and Dilma Rousseff, and the subsequent rise of right-wing populist governments.

In March 2008 in Argentina, the groups linked to grains exports initiated a series of protests and roadblocks in the face of a new tax modality which aimed at managing the imbalance between a highly competitive agrarian sector and various industries that were technologically lagging behind. The duration and widespread acceptance of the strikes in agricultural areas led some urban centers to the verge of food shortages.

This was the beginning of a series of “self-organized” demonstrations by sectors of the upper and middle classes in Buenos Aires, which expanded to other cities to the sound of pots and pans. Towards 2012 they became massive, but then gradually

lost steam. These demonstrations, known as #13S #8N #18A #8A #13N and #18F¹, gathered diverse grievances – corruption and the lack of freedom, the universal child allowance, etc. – all of which were expressed with aggressive chants and posters against the president and the ruling party.

In May and June 2013 in Brazil, protest events in favor of free collective transport shifted their focus and became a middle-class protest against the World Cup and the precariousness of public services. In 2015 and 2016, protests reached almost all major Brazilian cities, shifting character and acquiring a significantly aggressive tone against both President Dilma Rousseff and the Workers’ Party, and the social policies promoted since 2002. These manifestations combined the call for Rousseff’s impeachment, fascistic positions of regeneration of the dictatorship, and

public hostility towards the left. Numerous groups called directly for an “immediate military intervention.”

The middle and upper classes were demonstrating against the narrowing of the social gap that both governments were trying to achieve through anti-cyclical policies and regulation of the labor market. Small- and medium-size entrepreneurs rejected workers’ empowerment, and salaried classes rejected losing the privilege of having unregistered maids. At the same time, they associated social policy with the corruption of individuals and the state. They drew on the “theory of meritocracy” to normalize social inequalities and legitimize poverty as a personal failure flowing from laziness or lack of skills. This goes hand in hand with the “theology of prosperity” through which the Pentecostal churches state that effort is economically compensated by God, as well as with the “entrepreneurship” discourses.

This discontent, which began as a relentless condemnation, marked by Manichaeism and selectivity, of corruption – Kirchner’s in Argentina and the Petista’s (Workers’ Party) in Brazil – as a symptom of the “deviation of character” of the leaders, became a breeding ground for several kinds of fundamentalist theories. At the same time, a partial view was taken on who was actually involved in corruption, without questioning its structural character in both societies.

Fundamentalism is defined by the perception that there is a revealed truth that invalidates any possibility of debate. Anti-communist fundamentalism was reborn in Argentina and Brazil under the guise of *antichavismo*. The threat now is “Venezuelization” and “Bolivarianism” in general, understood as any attempt to tear down the foundations of “Western capitalism” and the “traditional family.” The anti-communist fundamentalists oppose the reduction of social and gender inequalities, which translates into hatred of the poor, feminists, gays, and blacks in Brazil and the *villeros* (shanty dwellers) in Argentina, all of whom are accused of being incompetent, ignorant, or venal.

This has opened the doors to the popularization of the ultraliberal ideology, inherited from the Austrian school, which, as the Brazilian social researcher Carapaná explains, is supported by two pillars: the “minimal state,” and the *pacta sunt servanda* according to which all rights are reduced to what is “freely” agreed by the parties. From there, a simplistic *sui generis* dichotomy is established that translates into: left-state-coercion versus right-market-freedom. The first sequence represents “equality” as a threat, while the second re-signifies the concept of freedom as “absence of the state.”

The second moment in the construction of right-wing populism is the marriage of convenience between

ultraliberalism and fundamentalist Christianity, in all its versions. The attack on the state is a common point of reference because while it “limits the scope of freedom,” it also reduces patriarchal authority through public intervention, even in private education. The alliance between NGOs defending ultraliberalism and the neo-Pentecostal churches was translated in Argentina and Brazil into a mix of attacks on social policy and state interference in the economy, condemnations of “gender ideology,” and accusations of “teachers’ indoctrination of students” in schools.

According to the Brazilian sociologist Camila Rocha, the success in the establishment of a subjective regime of hate, which prevents any possibility of analysis and democratic dialogue, can be explained by the effective use of new technological tools, the growing space that the hegemonic media granted to such ideas, and the capillary infiltration of traditional political organizations such as NGOs and political parties. Thus, consensus was reached against struggles that seemed to have been overcome with the return of democracy in both countries (Argentina in 1983, Brazil in 1986): the fight for human rights and the struggle against social inequality. And this consensus settled into these societies with a high dose of voluntarism, false postulates, fallacious simplifications, and endless “fake news.” ■

¹ Respectively: September 13 and November 8, 2012; April 18, August 8, and November 13, 2013, and February 8, 2014.

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> Radical Nationalism

as a New Counterculture in Poland?

by **Justyna Kajta**, University of Wrocław, Poland



Independence Day march organized by nationalistic forces in Warsaw, Poland, 2011. Wikipedia, Creative Commons.

The growing support for nationalist and right-wing populist parties has been of concern for sociologists and democratic policy-makers in many countries in recent years. In Poland, radical nationalist organizations have been more visible since 2015, when the right-wing conservative Law and Justice (PiS) party won the parliamentary elections. A similar increase in nationalist discourses can be seen in countries across Europe and elsewhere, where populist radical right parties attract votes through mobilizing around topics such as migration and sovereignty.

What does radical nationalism in Poland stand for at the present moment? What does it mean to fight

for “Great Poland”? In order to answer these questions I carried out research with members of nationalist organizations in Poland. I conducted biographical narrative interviews to trace their biographical paths to the organization as well as their motives and worldviews.

Looking at the ways in which the nationalists describe themselves and their activity, we can see four main discursive categories. Firstly, they see themselves as educators of new generations of patriots who know Polish history and promote the right political version of it. Secondly, they are defenders/(re)creators of Polish identity, based strictly on tradition and Catholic values. Thirdly, nationalists are anti-systemic activists who resist

the “system,” broadly understood as the EU, the political establishment, post-1989 politics, and liberal media. Fourthly, they present themselves as socially and politically involved citizens who – in contrast to the majority of Polish society – care about and are aware of possible threats.

Based on analyses of their narratives and materials published on their organizational websites, it can be said that the contemporary nationalist movement in Poland is a counter-postmodern social movement which resists liberalism and turns to tradition. It can be seen as a particular kind of counter-culture: anti-liberal (based on the – felt – dominance of liberal-left wing discourse and politics), anti-establish-

ment, anti-EU, anti-heterogeneous. While the counterculture from the 1960s was based on progressive slogans, what we now observe is the (impossible) turn to the past, which is hard to imagine considering all the changes that have happened since then. What makes this counterculture even more peculiar is the fact that the government (PiS) seems to be part of it. Another problem is its failure to strictly define the period of the past/traditional order to which it seeks to return: the past works as a kind of abstract concept rather than a specific point of reference. The contemporary nationalist movement is also an anti-systemic movement that challenges the political class and the lack of real, in-depth transformation after 1989 (including the lack of de-communization and the easy transition of political elites into national elites). Participants in the movement are connected by culture, identity, and politics rather than economics. They share (1) a feeling of

threat to the values (nation, religion, traditional family, history) believed to constitute the foundation of European civilization and Polishness; (2) the conviction that the political scene is full of hypocrisy; and (3) the conviction that the Polish nation has limited sovereignty.

Reality is seen in terms of stark dichotomies: at the most general level, the world is divided into “good” and “evil” (see Table 1). On the side of the “good” are the most important values for the organizations: European civilization, religion (Christianity), nation, and family. The values are described in reference to tradition, community, and moral order. They are considered native, natural, eternal, and hence, real. Additionally, we can observe two inseparable pair of categories – (1) Polish nation and Catholic faith and (2) European civilization and Christianity – that illustrate the centrality of religion in Polish nationalism. What dominates on the side of the “evil”

is liberalism, which is seen as contradictory to the traditional worldview, and which is identified with (among others) the European Union. Together with materialism, relativism, and egalitarianism, liberalism destroys the former order and leads to the disintegration of community. Contrary to the “good” categories, the “evil” ones are invented and “forced” by external power/groups. In such a reality, the political class, the European Union, homosexuals, and refugees become the main enemies. They personify characteristics and phenomena which are seen as harmful, because they threaten the vision of a homogeneous, cohesive, and sovereign nation.

Radical nationalism is based on two salient emotions: uncertainty, and pride. Taking into consideration ongoing changes in political, economic, and cultural contexts at the national, European, and global levels, uncertainty is a common and shared feeling and in itself is not a sufficient

Table 1. Dichotomous vision of reality in the discourse of the nationalist movement

GOOD	EVIL
tradition, community, and order	liberalism, egoism, and degeneration
European civilization	Liberal democracy
(real, eternal, rooted traditions)	(EU as a regime, totalitarianism, hostility, strangeness, falsehood, danger)
Eternal Christian values	Enlightenment's ideology of human rights and relativism
(Catholic faith, the source of morality, naturalness)	(artificiality, lack of objective truth)
National community	Cosmopolitan chaos and egalitarianism
(organic whole, hierarchy, freedom, sovereignty, order)	(materialism, mythologized/invented egalitarianism, disintegration of community and order)
Traditional family	Liberal/left-wing model of relationships
(health, community)	(politicians, media, feminists, homosexual lobby; illness, degeneration, harmfulness)

Source: Analysis of 30 biographical narrative interviews with representatives of the All-Polish Youth, National Rebirth of Poland, and National-Radical Camp in 2011-15, and materials published on their official organizational websites.



Independence Day march organized by nationalistic forces in Warsaw, Poland, 2015. P. Drabik/flickr. Some rights reserved.

condition to become a nationalist. However, radical nationalist discourse linked with the dichotomous vision of the world can appear as an answer to everyday problems, including those connected with the difficulties of maintaining a decent job, housing, and living standards. Stories about dangerous refugees imposing their culture and taking over social housing and jobs; sexual minorities abusing children; international corporations exploiting Polish workers; and liberals intentionally attacking Polish traditions and values are well received by some segments of Polish society. Such discourses bring easy answers and solid points of reference that deal with the burden of uncertainty by turning it into aversion towards invented enemies. Nationalism is also about national pride: a feeling

manifested as a protest against the semi-peripheral position of Poland in the world. Similarly, as Maciej Gduła's research on the Law and Justice voters shows, radical nationalism is a way of searching for the symbolic meaning of Poland and "rising from the knees." There is a strong need to feel superior to others and to build a better — historically conscious and anchored — nationhood.

Will the Polish society be dominated by the wave of nationalist counterculture? On the one hand, it can be said that radical nationalism is not going to lose its support soon and it is pretty hard to estimate what kind of other discourse can replace it and easily explain the complexity of the contemporary world. What is more, nationalist organizations marched

together with the Polish government during the Independence Day March on November 11, 2018, which shows that the political opportunity structure is favorable to their development. On the other hand, the representatives of oppositional, liberal and left-wing worldviews, despite of a less favorable political context, are still noticeable and active in the Polish society. One of the recent signs of their continuous relevance are the results of local elections: although PiS generally got the highest number of seats in regional governments, the inhabitants of the biggest cities in Poland elected more liberal candidates. What we can expect in the next few years is an increasing tension and conflict between cultural discourses rather than an overtaking of the public discourse by radical nationalists. ■

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> Taking Inspiration from Marie Jahoda

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Marie Jahoda in 1937. Credit: AGSÖ (Archive for the History of Sociology in Austria).

preceded by imprisonment. Her engagement with the social democratic movement had been forbidden by the Austrofascist regime since 1934. Only international intervention enabled her escape.

Jahoda first moved to Great Britain, where she was involved in several applied research projects, including a study of a subsistence production scheme in a Welsh mining region with high unemployment. In 1945, moving to the United States, she obtained a position in the research department of the American Jewish Committee, where she completed several empirical studies. In late 1947, she moved to the Bureau of Applied Social Research at Columbia University and started a fruitful cooperation with Robert K. Merton. In 1949, she became an Associate Professor and, in 1953, a Full Professor of Social Psychology at New York University. In 1958, she returned to Great Britain for private reasons and became a professor at Brunel University; in 1965 she accepted a founding position as Full Professor of Social Psychology at the University of Sussex. Jahoda died in the United Kingdom in 2001. In her home country of Austria, her extraordinary achievements were honored only very late in her life, in the late 1980s. She wanted to return to Austria after the Second World War, but received no job offers.

Marie Jahoda is the author of more than 250 publications, covering many different fields: employment and unemployment; attitudes and change in attitudes, especially concerning anti-Semitism; conformity and authoritarianism; public health; research methods and methodology; and psychoanalysis. The large number of her reviews in prominent journals shows her vital interest in different scientific fields.

> What we can learn from Marie Jahoda

As social scientists and politically engaged citizens, what can we learn from her scientific work and biography? First, as authors, we would like to mention our different backgrounds. One of us is a full professor of sociology at a university, another is engaged at a think tank, and the third

In 2017, the authors of the present article were engaged in editing, financing, and presenting the until-then almost unknown doctoral thesis of the famous Austrian social scientist Marie Jahoda, who finished her dissertation at the end of 1931 under the supervision of Karl and Charlotte Bühler. In 1932, the University of Vienna approved the dissertation. The dissertation was based on 52 qualitative interviews with inhabitants of the so-called *Versorgungshäuser* in Vienna, which were a kind of old-age home for poor and ill persons. It was the first empirical study to use biographical information of working-class people. The interviews and the dissertation offer an impressive look at the oppressive living conditions of the working class in the second half of the nineteenth century and the first decades of the twentieth century.

Simultaneously, Jahoda was involved – as is better known – in the famous study, “*Marienthal: The Sociography of an Unemployed Community*,” which she wrote in collaboration with Paul Lazarsfeld and Hans Zeisel. She wrote the main parts of this report during the summer of 1932.

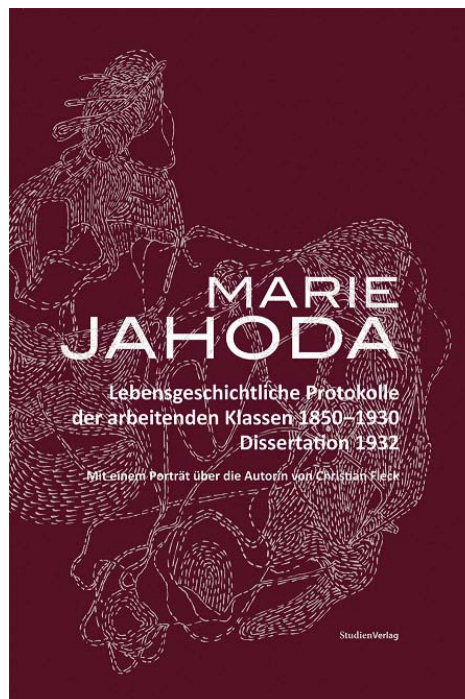
In 1937, the Austrofascist regime forced her to leave Austria with a few days’ notice, with her forced departure

has a position at the Austrian Chamber of Labor. We are of different ages and genders. We also share certain aspects in our backgrounds. The three of us studied social science (sociology and socioeconomics) at the same university, and we all want to help solve social problems and reduce social inequalities.

The first conclusion we would draw from Jahoda's scientific work and biography is that we should focus our work on people's real-life problems. That also means engaging personally with people's social problems. Jahoda's biography offers many good examples. Such engagement stimulates research, as Jahoda stressed in her methodological work, and also allows for a better understanding of social phenomena and may even lead to finding solutions. Jahoda stressed that scientific questions developed in the abstract are not always useful for defining and solving social problems. This plea is neither new nor specific to Jahoda. As we all know, it is not an easy one to answer.

Second, we learn from Jahoda that the analysis of social problems and social inequalities requires interest in many scientific fields and cooperation with colleagues from different scientific disciplines. Interdisciplinary competition is unhelpful, because it is not possible to divide social problems by scientific field. Marie Jahoda's work knew no scientific boundaries, with her interdisciplinary focus especially between sociology and psychology. Her concept of non-reductionist social psychology is fruitful for exploring what she called social reality, linking social structure and personality (respectively, sociology and psychology). One task of non-reductionist social psychology is to analyze which experiences a social institution provides, how their interpretation influences people's behavior, and vice versa. Jahoda's concept of the five latent functions of employment is still an excellent example of this linkage. The concept assumes that employment as a social institution provides specific kinds of experiences that fulfill basic (fundamental) human needs. Employment (1) structures the day; (2) activates people; (3) broadens people's social horizon beyond their private family; (4) contributes to higher collective purposes; and (5) provides social identity and status.

These five latent functions and their relations to basic human needs are still important and useful in analyzing social changes, at least in Western countries. We should ask ourselves more frequently to what extent and for which groups of people certain societal developments violate these basic human needs. According to Jahoda's methodological principles, such analysis should be based on the everyday



Bookcover of Marie Jahoda's 1932 dissertation, recently published in 2017 by StudienVerlag: Marie Jahoda Lebensgeschichtliche Protokolle der arbeitenden Klassen 1850-1930 [Marie Jahoda life-historical reports of the working class, 1850-1930], edited by Johann Bacher, Waltraud Kannonier-Finster, and Meinrad Ziegler.

life experiences of people and their human needs. Keeping that in mind will make our analyses livelier and our findings more convincing (see the discussion about think tanks in [Global Dialogue 8.2](#)). Our results will find broader audiences and stimulate public discussion (not everybody must agree!).

Finally, our analyses should focus on the development of humanity. In our opinion, the social sciences have recently concentrated primarily on the question of why society hinders the development of our humanity. These analyses, while urgent when considering the severe and diverse social problems faced by our global societies, often lead to a negative or pessimistic diagnosis, and such a negative view has become part of our identity as social scientists. Following Jahoda, we should link real-life problems more closely to our scientific research on the one hand and develop a more optimistic attitude on the other hand. This would also help us to strengthen the role of academic expertise in the scientific and political discourse in a time of growing influence for neoliberal think tanks. Our analyses should in part answer the following question: what societal conditions must be fulfilled for us to develop our humanity? ■

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> Labor Relations and Social Dialogue in Portugal

by **Elísio Estanque**, University of Coimbra, Portugal, and member of ISA Research Committees on Labour Movements (RC44) and Social Classes and Social Movements (RC47), and **António Casimiro Ferreira**, University of Coimbra, Portugal



Mural on the streets of Lisbon depicting the Carnation Revolution of April 25, 1974.
Photo: Kimble Young, Creative Commons.

Portugal is a semi-peripheral country that underwent a democratic transition in 1974, following a long period of dictatorship (starting in 1926). The authoritarian “Estado Novo” (New State) was established by the Constitution of 1933, which laid the normative foundations of a fascistic corporatism that legitimated state control over trade unions and built on the violent repression of workers.

Working-class resistance was sparse and sporadic over the 48 years of authoritarianism. Only at the end of the 1960s did some organized groups of resistance within the corporatist unions become perceptible. This was the result of urbanization, population concentration in the coastal areas, the growth of some public services, as well as the increase of the economy’s tertiary sector, which opened space for new associative dynamics among labor (although still clandestinely). It was in this context that the trade union confederation still dominant today (Intersindical Nacional, today known as CGTP – General Confederation of the Portuguese Workers) emerged in 1970. However, throughout this period (from the late 1960s to the revolution of April 25, 1974), despite the relative opening of the economy and the growth of the service sector, Portugal remained a predominantly rural country. The incipient industry was based on cheap labor framed by a state-controlled economy and within a repressive and tutelary regime surveilling workers, unions, and the society in general.

It was the Carnation Revolution (April 25, 1974) that created the conditions for the emergence of the current system of labor relations and labor rights. It is only since then that one can speak of social dialogue and labor law in Portuguese society. Further, it was due to the strong revolutionary effervescence of the social and popular movements of that period (1974-5) that Portugal became the rare Western country to openly embrace a socialist project, as recognized in the 1976 Constitution. However, those conflictual and revolutionary times also left a deep mark on the country (for better and for worse), setting in place a structural cleavage between opposed social models. This was translated within the political field into a division be-

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tween anti-systemic ideologies – PCP (Communist Party) and the far left – and social-democratic or liberal ideologies – PS (Socialist Party) and PSD (Social Democratic Party). This conflict was mirrored in the trade union field between, on one side, the CGTP (a “class-based” trade unionism, of communist influence) and, on the other, the General Union of Workers (UGT – a reformist and dialogue-driven trade unionism), founded in 1978.

The labor law set up under the new constitution reflected, especially in the early phase, the influence of the intense class struggles of the revolutionary period. The Constitution institutionalized a tripartite structure at the macrosocial level: this was the Permanent Committee of Social Dialogue (CPCS) established in 1984, later replaced by the Economic and Social Council (CES) in 1991. In practice, the pattern of social dialogue and labor relations has oscillated according to different political conjunctures and the dynamics of power relations among social partners, as well as the evolution of economic and social indicators. Over the last 30 years, crisis periods and the impacts of the global economy have triggered several legislative changes constraining social policies, following a general trend of deregulation, flexibilization, and segmentation of labor.

The recent economic-financial crisis of 2008 had an intense impact on Portugal, especially during the bailout program (2011-14). In that period, the conditions of a “state of exception” emerged in Portugal. The austerity measures imposed by the Troika (the European Commission, the European Central Bank, and the International Monetary Fund) and zealously applied by the previous right-wing government (PSD / CDS, led by former Prime Minister Passos Coelho) intensified social inequalities and exclusion in a context of social tensions involving a cycle of protests and strikes, driven by social and labor movements.

This austerity framework involved social organization and political and juridical institutionalism aimed at calming and stabilizing the markets through budgetary deficit compliance and through the destruction of social dialogue mechanisms. The austerity measures and neoliberalism’s “reformist” agenda converged with a drive to reduce labor costs and compensations for dismissal, flexibilize working time, and restrict collective bargaining. Specifically, a series of emblematic legislative changes were introduced to reduce benefits applied to the working class. The role of trade union structures foreseen in the Constitution was also restricted, instead privileging the role of both works councils and company unions.

Simultaneously, the privileged form of labor relations regulation – collective bargaining – suffered strong constraints due to the limits of labor contracts and collective agreements. These, inasmuch as they depend on a negotiation period – with or without agreement – objectively favor employers. The situation of collective bargaining during the

austerity period was reflected in the blockade of this form of social dialogue through the increase of power asymmetries between workers and employers. On the other hand, on the macrosocial level, the Economic and Social Council (CES) has played an important role in rolling back the labor relations framework, under the pressure of commitments made with the Troika. Hence, the items diluted in the more encompassing process of the so-called “structural reforms” could hardly resist such decisions without losing the political and juridical identity of labor law.

The austerity narrative characterized by market fundamentalism delegitimized alternative diagnoses of reality, blocking any legislative agendas reflecting a social ethos protective of labor rights and social justice. The very institutions and organizations of social dialogue and citizenship saw themselves coopted and converted into instruments for the legitimation of the new austerity.

After the democratization process (as of 1974), four moments can be identified: the expansion and exhaustion of macro social dialogue between the years 1970 and 1980; the return of social dialogue in the 1990s, related to the processes of European integration and globalization; the moment of crisis in social dialogue, marked by an engagement with the deployment of austerity measures and subsequent legislative reforms; and, finally, the present moment in which, via parliamentary agreements between the Socialist Party government, the Communist Party, and the Left Bloc, the negotiation axis has been moving towards parliament, with a gradual reduction in the importance of the negotiation mechanisms (both collective bargaining and tripartite mechanisms).

In conclusion, the most recent post-Troika period has opened space for a new political solution, offering new conditions for a return of social dialogue. For this reason, the country is held up today as a counter-cycle example in the European context, displaying moreover a surprising viability of alliances between different left political forces. In this new political-labor configuration, it isn’t just the political-partisan protagonists nor the social protest movements, but also the different forms of trade union action that have contributed to an atmosphere favoring alliances and negotiation processes. In spite of the doubts and perplexities raised by this solution, the Portuguese experience shows that the future of social dialogue involves new configurations among social actors encompassing the political and labor spheres. It demonstrates that economic-financial recovery, in spite of its vicissitudes, can be combined with the recovery of social policies and a revival of alliance politics, in a representative democracy within which conflict and negotiation are inseparable. ■

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