

## 68. A global research agenda on inequality for the next ten years

*The World Social Science Report 2016 Editorial Team*

This Report has demonstrated that inequality is already the subject of rich social science research. It has also helped identify important gaps in our awareness of inequalities. In this final Part of the report, we look towards future social science agendas, asking what new kinds of research and knowledge are needed to deepen and extend our understanding of inequalities. And crucially, what are the roles of social science in identifying and building transformative pathways towards greater equality?

Multiple, intersecting inequalities require multidimensional knowledge. In the following pages, we consider key elements of a research agenda which acknowledges all seven dimensions of inequality defined and discussed earlier in this Report – economic, social, cultural, political, spatial, environmental and knowledge – and which could improve understanding of their intersecting dynamics and their consequences over time and around the world.

To make progress in these areas means going well beyond current technical debates, such as that on the measurement of economic inequality, important as these are. This first means a shift towards integrating a far wider range of disciplinary lenses when setting agendas and defining frameworks for research, including not only anthropology, sociology, psychology, geography, political science and legal studies, but also the arts and humanities.

Even when research addresses issues such as education, health, political participation and gender, which range beyond income, consumption, employment and wealth, there is often an implicit push towards the quantification of these dimensions. This trend may well be reinforced by the need to monitor the indicators of the Sustainable Development Goals (SDGs). A second shift is needed, one that goes beyond quantification, integrating well-designed and conducted qualitative and participatory methods, and developing innovative combinations of quantitative and qualitative research to better understand why and how inequalities persist.

The improvement of our knowledge of inequalities also implies analysis of how social science can be used to challenge them, and in doing so contribute to a more equal and just world. Transformative pathways, we suggest, require transformative knowledge; transformative in what it covers, how and by whom it is produced and communicated, and how it interlinks with action and change. There are key opportunities for a transformative knowledge agenda that is co-constructed with those who are experiencing inequalities and are in a position to influence change through policies, practices and politics. At the same time, others argue that the role of the researcher is different from the role of the activist, and that social science and political practice cannot be reduced to each other. The relationships between research and action will necessarily vary by issue and context. The challenge now is to configure those relationships collectively to chart a transformative agenda towards equality.

### The production of social science research on inequality

Inherent in this challenge is knowledge inequality itself, and how knowledge inequalities link to other intersecting inequalities. These include inequalities in the construction of knowledge – which kinds of knowledge are produced, by whom and where. They also include inequalities of access to formal, organized, published knowledge, as well as that available online amidst digital divides. And they include inequalities in whose knowledge counts. These include the tendency for economic knowledge to be prioritized over that from other disciplines, for technical, quantitative measures to be given more weight than studies rooted in lived experiences, and for expert knowledge to predominate over indigenous ways of knowing.

The bibliographic data assembled here (Caillods, 69 and *Annexes*) on the number of journal articles on inequality published in the past twenty years (1993–2012) provide interesting insights into these themes. First, we notice a dramatic increase in the number of social science journal publications on inequality.

Not only is the volume of publications increasing, but these publications are employing new and innovative methods, for instance in accessing and using big data to uncover broad patterns and linkages between different forms of inequality, as Savage (70) points out.

A second trend is for inequalities to become a concern for a broader range of disciplines. Even though economics, political science, sociology, and more recently education predominate, social psychology and gender studies make important contributions. This broad spectrum of disciplines confirms inequality as a theme of interest for social science in general. Interestingly, however, the social sciences (including economic and behavioural sciences) are no longer the only dominant voices on the topic. The health sciences are now producing nearly as many articles on inequality as all the social science disciplines put together.

A third feature, regional disparities in the production of social research on inequality, constitutes arguably the most problematic trend. Over 80 per cent of publications on inequality in the past twenty years are by researchers based in North America and Western Europe. It is positive to see an emerging middle-income country such as South Africa, with its particular historical legacy and current levels of wealth inequality, among the leading countries in terms of research produced. But very few articles are produced by researchers in India, China and Brazil, let alone in the poorest countries, where those most affected by the bottom end of global inequality live. Despite efforts to overcome this gap with this Report, which counts contributors from some forty countries, we recognize that we have succeeded only partially in bringing together the global perspective required to understand a complex phenomenon such as inequality in all of its diversity.

## Towards a new agenda

In a world in which knowledge shapes power and voice, and vice versa, the fundamental inequality in the production of knowledge about inequality itself must be addressed. In addition, the contributions to this Report, as well as the process of compiling it, have pointed to a number of other gaps in the study of inequality which need attention in the future. On the basis of this Report, and additional suggestions from a survey of contributing authors, we point to seven key priorities for social science research and action.

### Priority 1 – Increase support for knowledge production about inequality, and processes of social inclusion and exclusion, in those places most affected by them

The places at the lower ends of the inequality scales are often those where there is the least published social science knowledge on the theme. To put it another way, there is knowledge inequality in the production of knowledge about inequalities. It is an urgent priority to provide intellectual and financial support for the capacity of researchers who can collect, organize and analyse data on inequalities in such places, and how they evolve.

Action areas include:

- Expanding collective wisdom about inequality in the most affected areas, through support for geographically focused research efforts;
- Supporting researchers and institutions in poorer parts of the world to study inequality in their settings and from their perspectives. This includes supporting the capacity of state statistical agencies, which are often heavily under-resourced in poorer countries;
- Developing inclusive international networks of inequality researchers, thereby,
- Strengthening cross-country and cross-regional comparative work on inequality, its mechanisms and consequences;
- Developing and supporting open data sources, with open access publishing and open access software to enable researchers to contribute to and engage with multidimensional social science debates;
- Support for training and capability enhancement in the poorest parts of the world, including state-of-the-art methodologies, alongside links between research and practical change.

### Priority 2 – Improve our ability to assess, measure and compare the dimensions of inequality over time and across the world

Social science understanding of inequality depends very much on our ability to measure and compare it across countries, across population groups and over time. This remains difficult across the multiple dimensions of inequality. With respect to the SDGs, Rogers (74) emphasizes the need to monitor inequalities across the full spectrum of factors that

may contribute to human well-being, combining indicators of economic inequality with those for political participation, health, education, access to clean air or water, safety and security, and so on. While there has been a great deal of work over the past two decades on multidimensional indicators of poverty (e.g. Alkire and Foster, 2011; OPHI), there is now growing interest in the construction of multidimensional indicators of inequality (Aaberge and Brandolini, 2015), including single indices that aggregate different dimensions into one number such as the Inequality-adjusted Human Development Index (IHDI). So far this is very much work in progress, but it offers rich possibilities for advancing our future understanding of inequality changes, causes and consequences across the world.

Action areas include:

- Supporting further work on understanding the multiple dimensions of inequality and their interactions;
- Fostering comparative studies of the evolution of key dimensions of inequality in different groups of developed and developing countries; taking forward large-scale longitudinal projects which capture both actual and perceived inequalities between individuals and groups over time in various settings, including low-income countries in Africa and Asia;
- Increasing coverage of panel surveys in Africa and Asia. Few are currently carried out and they are often not longitudinal;
- Using the enormous capacities offered by big data technologies (Savage, 70) to track correlations between practices, habits, and diverse inequality indicators for specific population groups.

### Priority 3 – Deepen our understanding of diverse experiences of inequality

While we need more and better data on trends in inequality, we also need a far deeper understanding of how it is experienced by different groups in different settings. For instance, several authors in this Report point to the need to understand further the stress and psychosocial impacts of inequality for those left at the bottom, including such aspects as fear, feelings of powerlessness and inferiority, and limited aspirations. We must complement statistical measurement with subjective assessments of people's relative well-being across a range of indicators

(social acceptance, personal safety, health, education, housing, employment, financial stability, community influence and others), disaggregated by characteristics relevant to discrimination. Anthropological and participatory approaches go further, encouraging people themselves to define key concepts, criteria and meanings, according to local language, experience, history and identity. Yet while studies of subjective experience have been conducted for decades with a focus on poverty (e.g. Anderson and Broch-Due, 1999; Narayan et al., 1999), very few have an explicit focus on inequality.

Action areas include:

- Exploring how groups most affected by inequality make sense of their realities, including the notions, values, or narratives used to explain their conditions. How do these vary by social differences, such as gender, and according to people's diverse identities?
- Addressing how perceived inequalities and subjective assessments of relative well-being may lead to varying consequences, such as violence, unrest, conflict or migration, in different settings;
- Deepening understanding of how different dimensions of inequality are transmitted or mitigated intergenerationally;
- Identifying how inequality is affecting the middle classes in emerging economies and in high-income countries.

### Priority 4 – Deepen our understanding of how multiple inequalities are created, maintained and reproduced

Another gap to be filled concerns the mechanisms through which multiple inequalities interact and are created, maintained and reproduced. We know remarkably little about the nature of these interactions. Those untangling them will need to attend to culture, social norms and values, and religion, as well as to material economy, politics and resources. Studies can examine the interacting effects of policies and practices intended to address inequalities, not just by looking downwards at those negatively affected by inequalities, but looking up as well. For instance, interdisciplinary research on tax and legal havens would help us understand how those at the top develop and maintain their privilege, including through their hidden power and wealth.

Action areas include:

- Conducting case studies and historical research on inequalities in specific contexts, and on how new trends in inequalities develop. Such studies can combine various approaches and methods, for instance integrating feminist and political ecology analyses to track interactions between gender and environmental inequalities;
- Exploring how those at the top develop and maintain their privilege and power, while also improving the transparency, availability and comprehensiveness of data on wealth;
- Conducting comparative studies of how inequalities are created and reproduced under multiple modernities and varieties of capitalism;
- Examining how recent, rapid technological change (for example, in robotics, machine learning and biotechnology) affects forms of inequality;
- Investigating the nature and role of corruption of various kinds, and of tax and legal havens, in creating new inequalities and maintaining existing ones.

### **Priority 5 – Deepen our understanding of how local and global forms of inequality connect and interact**

The question of scale is closely related to mechanisms for the creation and reproduction of inequality. Understandings of inequalities need to shift from global to local contexts and patterns and back again. They need to encompass international and national processes, but also local experiences, effects and agency, drawing on local knowledge and taking into account local variables. They need to examine how power, operating across multiple scales and in multiple forms, shapes, sustains and transforms configurations of inequality. This calls for research approaches that are rooted locally and connected globally. There are roles for global research networks and partnerships, for new modes of global–local participatory research, and for adapting approaches attuned to dealing with multiple overlapping scales to the question of inequalities. Examples might include multi-sited ethnography (Marcus, 1995) and complex systems analysis (Gunderson and Holling, 2002).

Action areas include:

- Exploring the effects of extreme economic inequality on new forms of inequality in power, on a range of scales. For instance, how do global political economic actors and globally connected media grip and shape perceptions, imaginations and debates in local contexts?
- Identifying how concepts and discourses related to inequality travel and are adapted on different scales, and with what effects;
- Analysing how global power relations produce and reproduce various forms of inequality in interaction with local contexts.

### **Priority 6 – Promote research on how to move towards greater equality**

The research focus on inequality has arguably obscured visions of better futures. Research needs to move from understanding inequality to identifying moves towards greater equality, and how transformation towards it might be achieved. This in turn demands a shift of language and framing. There is much to be done to understand the policies and interventions that work to promote more equal societies, as well as the forms of mobilization and intervention that develop the will to do so. While lessons might be drawn from the past, we also need to look to the future.

Action areas include:

- Elucidating how transformative pathways towards greater equality have unfolded historically in localities, countries and regions. What drivers and dynamics lead to greater equality in specific contexts, and what are the roles of non-linear change?
- Identifying what kinds of policies can lead to effective, deep and lasting change towards greater equality in specific contexts, for instance in relation to gender;
- Tracking how global, national and local initiatives interact and complement each other in reducing inequality, asking for instance how successful policies and initiatives came about and were implemented, and how transferable and scalable local initiatives are;
- Tracking the possible trade-offs between policies aiming at fostering greater equality and those aimed at other important development goals, such as sustainability;

- Exploring how deficits in accountability and of trust in institutions are impeding demands for and actions towards greater equality. What measures have contributed to improving accountability?

### **Priority 7 – Support cross-cutting syntheses and theory on inequality and equality**

While empirical studies and data are vital, the integration of knowledge into new syntheses on inequality and pathways towards equality, and ultimately into new theory, will be critical. A global research agenda would combine the production of new data on inequalities and equality with finer understandings of their mechanisms and effects on people, alongside the development of new research capacity and infrastructures that can integrate these into higher-level conceptual advances. These new syntheses will have to integrate quantitative data, correlation analysis and qualitative assessments; they will need to offer convincing understandings of how the various inequalities interact at different scales; and they will have to cover a much broader scope of countries and regions than today's analyses. The recourse to more data, and the production of better data, does not hail the end of theory. But surely theories must be revisited and reassessed. When necessary, new words and categories must be created to depict new realities, and volatile indices must be improved (Deneault, 71). Working towards this kind of synthesis will also contribute to the achievement of the SDGs by providing countries with the evidence necessary to inform action.

Action points include

- Developing and promoting new synthetic approaches to research on inequality, which link across knowledge, policy and practice, and across disciplines and scales;
- Encouraging new conceptualizations of the meanings and consequences of inequality, in the light of rapid change and new realities;
- Creating and maintaining new data sets and collaborative research platforms on inequality and equality. These would be open to researchers around the world and would integrate quantitative and qualitative sources across countries and regions.

### **Towards a more transformative social science**

While the above priorities are important, even taken together, they are not enough. Transformative pathways for reducing inequality, we suggest, demand a transformative social science, one that treats inequality and equality not just as a matter for analysis, but also as a normative concern, seeking to inform struggles for social justice. It moves beyond the mainstream to seek out alternative perspectives, and to combine methods and perspectives in new ways. And fundamentally, it engages society, often by co-designing agendas, co-constructing knowledge and co-communicating findings with different groups, including those positioned to bring about change.

Moving forward with such an agenda requires us to challenge and overcome knowledge inequalities within the research enterprise on inequality. As we have seen, these are many, with certain kinds of study – by region, discipline, or quantitative–qualitative orientation – dominating. Addressing inequality through the social sciences does not just mean producing more social science on the subject. Simultaneously, it is also about addressing inequalities in our knowledge of inequality – of access, of construction and co-construction, of whose knowledge counts.

These are not new themes in the social sciences. There are long traditions of social science research which try to overcome knowledge inequalities, whether approaching this from feminist perspectives, critical sociologies and philosophies of knowledge, participatory action research, or other angles. Here, Cooperative Sulá Batsú (Jiménez, 73) exemplifies a successful approach to challenging prevailing knowledge hierarchies by including and legitimizing indigenous knowledge and protecting its holders from expropriation. Minujin (72) describes a collaborative action research process in Latin American cities, in which co-constructed knowledge about childhood inequalities was translated into municipal action. Contemporary literature and practice contain many further examples, from bringing citizen knowledge to challenge the dominance of medical and humanitarian knowledge in the 2014–15 Ebola crisis, transforming the response and its effect on health inequalities (Martineau et al., 2016), to bringing the knowledge and perspectives of activists and lawyers together to transform gendered knowledge around sexuality and social justice (Lalor et al., 2016).

In such cases, researchers often co-construct knowledge with relevant members of society – community members, civil society organizations, activists, policy-makers or practitioners. Here the role of the researcher, community actor or political activist remains different and distinct, but at the same time, new relationships are forged between them. Co-design and co-production in research have received growing attention in many fields over the past decade. Much has been learned about when and how it can be effective, and what it can achieve in terms of relevance, impact and links with action and change. What is clear though is that the playing field is rarely level. Successful co-construction usually requires acknowledging and overcoming political and knowledge inequalities amongst the participants.

Co-construction is just one valid approach, and transformative social science works through other modes as well. Research can make a difference by being committed to and informing processes of change undertaken by others, even if it is not the task of social scientists themselves to mandate or make that change. Knowledge can be mobilized to inform action through many routes, from written, verbal and online briefings and dialogues, to impact-oriented communication strategies with policy-makers and practitioners, and to new ways of visualizing and communicating that combine 'data, theory and politics' (Savage, 70). While moves to 'evidence-based policy' often imply that such linkages are immediate and direct, research on knowledge, power and policy processes tells us that time lags and political interests often intervene. Informing change effectively can therefore mean finding the right moment, or the right ear to listen to and take up key messages. It can mean forging the right networks, relationships or alliances between researchers and groups of societal actors. Nor should we forget that it is not just evidence, but also theoretical and conceptual research, that can drive transformative change. The concepts and analysis of gender produced by feminist scholars over the past two decades have profoundly defined and then advanced research and action around gender inequalities.

## A step change

We could add to these gaps in the study of inequality and equality many more specific ones. There is clearly need for more work on the strengths and weaknesses of particular measures of inequality, or for the study of one particular dimension or another of inequality.

As well as researching the perceptions of the poor, we need to identify the circumstances under which the better-off come to perceive poverty and inequality as impairing their well-being. The list could go on, and become quite long. However, simply continuing as is with more and more specific studies without rising to the larger challenges discussed above might make only marginal contributions to our understanding. A step change is needed, one which will result in a truly global research agenda that is far more interdisciplinary, methodologically pluralistic, multiscaled and globally inclusive than we see today, and which contributes towards more equal and just futures. What is needed are not only transformative pathways for challenging inequality, but transformative forms of social science that help take us there. The question is, can social science rise to this challenge? It is a big ask, but the level, consequences and scale of the inequalities documented in this Report by researchers from across regions, methods and traditions demand no less.

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