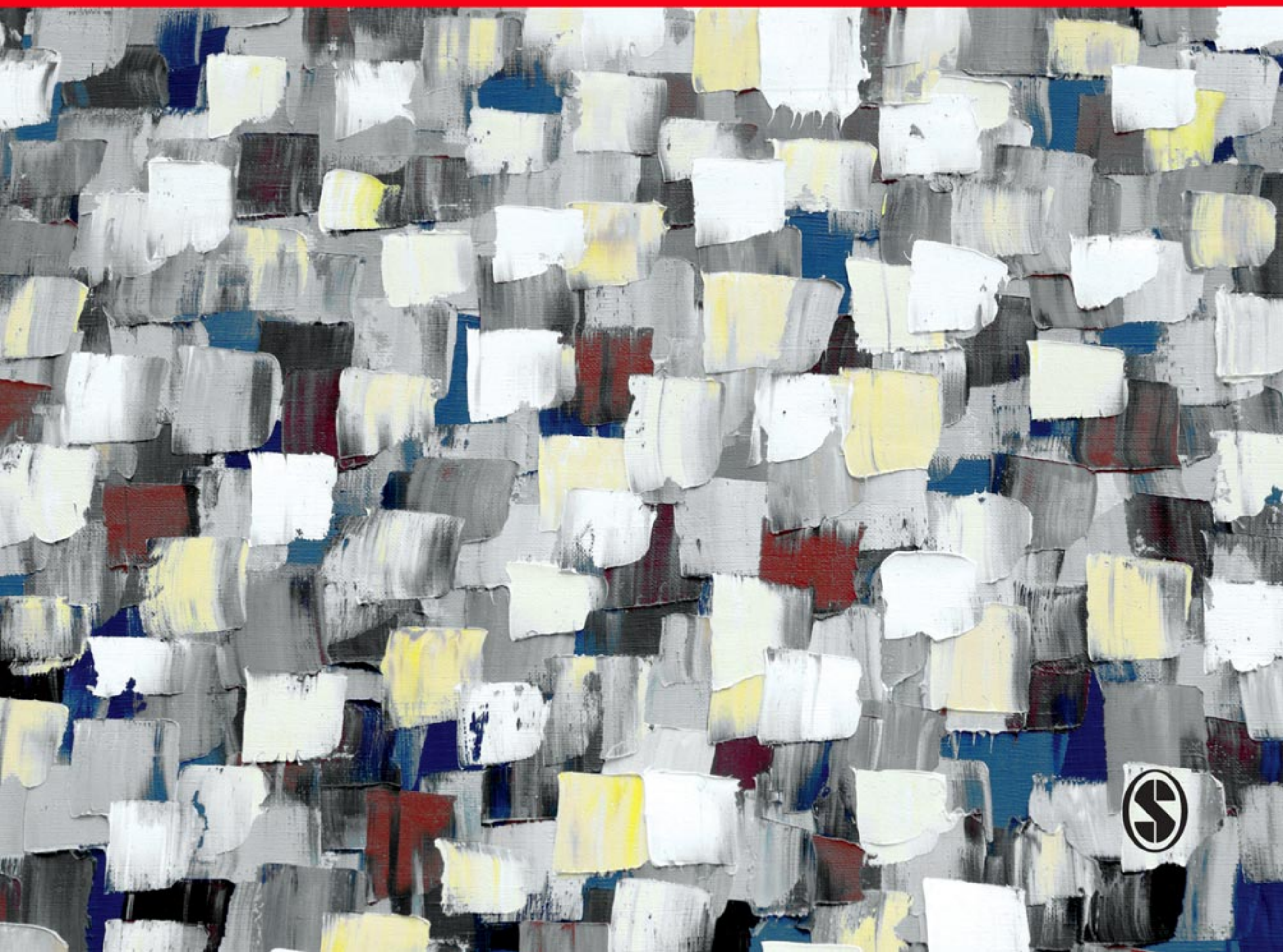# Globalization and Inequalities

Complexity and Contested Modernities

Sylvia Walby

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1 Introduction: Progress And Modernities

Introduction

The future is contested. What are the implications of the different social models that might come into being? What is progress? Is it being richer, living longer, reduced inequality, or more human rights? What is modernity? Is modernity over, or is the project of modernity not yet completed? Social theory is challenged to take account of complex inequalities beyond class: how can they be included so that they are central, not marginal? Globalization challenges the notion of separate societies: how do global processes change social relations? What difference does the inclusion of complex inequalities and global processes make to the analysis and to social theory? What difference does the inclusion of complex inequalities make to our view as to what constitutes progress? The aim of this book is not only to produce better accounts of social change in a global era, but also to rethink core concepts and theories. A key aid here is the development of complexity theory.

'Progress' is an essentially contested project. There are vigorous disputes over what the proper goals of global policy should be, over the priorities for action by governments and international bodies. The meaning of 'progress' is far from obvious, ranging from economic development to human well-being, equality and human rights. Protagonists vigorously disagree about which is more important, with implications for the goals of global as well as national public policy. How are such contestations conducted? Are they so rooted in values that are so deeply held that to debate is a challenge to fundamental aspects of people and cultures, or are they amenable to rational scientific debate over priorities? In practice, even deeply held values are challenged by appeals to internal inconsistency and empirical evidence about their effects when implemented. This book aims to clarify the

alternative framings of the notion of progress and to identify their implications. Does the evidence support or contradict deeply held convictions as to the best way forward? Which project emerges best, when subjected to social scientific Scrutiny?

Modernity has been a key concept in classic Sociology, used to address large-scale social transformation. The transition to modernity preoccupied many of the major social theorists, from Marx and Weber to Durkheim and Simmel. But is modernity still the best way to understand contemporary social relations? Or are we now living in a postmodern era? Challenges to the concept of modernity are aimed at its apparent assumption that there was a single unilinear process of development, and that it was good for everyone. Such a notion is clearly untenable, in view of the horrors of the descent into war and 'ethnic cleansing', the diversity of paths of development, and the uneven position of different social groups in the same country. Are we not yet modern, rather than postmodern, or are there multiple varieties of modernity?

Globalization is a challenge to social theory. It demands a re-thinking of the notion that there are societies constituted as separate bounded entities. It raises questions about the taken-for-granted equation of society and nation-state. Is globalization merely Westernization or Americanization, or does it hybridize all cultures, creating new commonalities? Is it eroding differences between cultures producing convergence? Globalization requires the analysis of new types of global processes, and the re-framing of many ostensibly local or national projects within a global landscape.

Social theory is challenged to address the multiplicity of social inequalities, not only that of class. The significance of diverse inequalities for social life is recognized, but building this insight into the core of social theory rather than remaining in specialist sub-fields has proved more difficult. Traditional social theory addressed class inequality, but had difficulty when trying simultaneously to address gender, ethnicity, age, religion, nation, sexual orientation, and disability, and even greater difficulty in addressing their mutual constitution at points of intersection. Further, these social relations are more complex than class in that they involve not only inequality but also difference, thereby problematizing notions of a single standard against which to judge inequality. The challenge then is to include intersecting complex inequalities within the core of social theory.

In order to insert globalization and complex inequalities into the heart of social theory it is necessary to develop new concepts and to rethink how theories are put together. There is a need both to capture the distinctions, differentiations and nuances of complex inequalities that have been part of what has been driving the postmodern turn,

and to simultaneously keep the global horizon in sight. There is also a need to retain the conception of inter-linkages so as to be able to analyse the global level, while not falling into the mistaken simplicities of over-generalization across cultures. Developments in complexity theory offer a new vocabulary on which social theory can usefully draw in developing concepts to meet these new analytic challenges. These offer the opportunity to build a more complex theoretical framework that enables the theorization of both large-scale connections and of sudden ruptures and non-linear processes. Complexity theory enables the re-thinking of the concept of social system to address, without reductionism, multiple systems of social relations.

This chapter addresses first, the contested issue of what progress might be; second, the challenge of theorizing multiple complex inequalities simultaneously; third, the conceptualization of plural forms of modernity; fourth, the challenge of theorizing global processes; and fifth, the usefulness of complexity theory in addressing these challenges in social theory.

What is Progress?

More money or a longer life?

Is it better to have more money or to live longer? People in the United States of America have more money but die sooner than those in the European Union. Americans have over 40 per cent more income than these Europeans, but live on average for two years less (World Bank 2006c).

Is increasing income a measure of progress? Or is living longer a better indicator? There are different ways of thinking about progress, so how should they be evaluated?

What kind of social arrangements produce progress, however it is defined? Is it the greater freedom of the market in the USA as compared with greater state regulation in Europe? Is it the greater inequality in the USA as compared with Europe? Or the more violent nature of the USA than Europe?

The two divergent goals of money and longevity are associated with two quite different conceptions of progress. The first takes the economic, especially money, as an effective summary indicator of progress and of what is good and desirable; it is often used by national and international bodies of financial governance. The second is focused on the outcome for human well-being, of our capacities and capabilities, of which longevity is an indicator. Further, framings of progress include

'equality' and 'human rights'. Indeed many social and political projects have their own distinctive accounts of what constitutes the best social arrangements to produce the 'good life'.

Different social systems have different levels of success in converting economic resources into human well-being. The EU social system is more effective in this than the USA. It is the differences in social systems that are crucial to understanding the implications for individuals. The EU and US social systems link economic resources to human well-being in different ways as a result of differences in how their social systems have developed.

Different cultures prioritize different values. What is meant by progress and what are the preferred goals of public policy? Can there be a single notion of progress in the context of varying values? What kinds of social arrangements achieve progress?

Progress as a contested project

There is no simple answer to the question of what is progress. Rather, it is an essentially contested concept. Indeed, so contested that some will give up all hope that it is a useful project to engage with.

There are three main approaches to the concept and project of progress. First, that modernity is progress. For classical sociologists, analysing the transformation of society that is associated with industrialization and urbanism, modernity was progress, but a development that many saw as double-edged, with a down side as well (as discussed in the next section). A second response is to deny the usefulness of the concept and project of progress: it is too simple, falsely universalistic, and ethnocentric. Rather than a universal 'one size fits all', there are a potentially infinite number of particular ways of thinking about what constitutes the 'good life' and how to get there that are rooted in different cultures. A third position sees progress as a contested project: there are alternative conceptions, but not an infinite number; it exists as a notion that is highly contested; it is argued over in politics and policy, philosophy and theory, data, and analysis.

Within this third approach four key alternative goals of progress can be identified – economic development, equality, human rights, and human well-being – though there are others, including a respect for traditional or fundamental practices. The first is that human welfare is best advanced by economic growth and high levels of economic development. The second prioritizes equality. The third is human rights. The fourth has a focus on human well-being, which is more than just a high standard of living but includes education, health, and longevity.

These goals of progress are embedded in projects that are rooted in civil society. Sometimes these projects will become the foundation of governmental programmes. Finally, they may become embedded in practices in social formations. Today, two major competing projects claim in quite different ways to take forward some of these goals: neoliberalism and social democracy. They claim in varying ways to produce economic development, aspects of equality, human rights, and human well-being.

Economic development

The first framing of progress focuses on economic development and economic growth. Economic development is expected to increase the average income of a person and thereby their standard of living. While this approach appears to treat economic development as an end in itself, it usually rests on the implicit assumption that economic development is a means to the delivery of an improved standard of living and a further additional assumption that this is a popular policy goal. The higher the rate of economic growth, the faster will the standard of living increase. Improved economic performance is assumed to mean a more effective utilization of resources to deliver goods and services. The approach claims to be neutral as to the way in which this income is spent by people and regards this neutrality as positive. Economic growth and development is defended as the best approach to progress, on the basis that this constitutes an indication of the average standard of living of people in a country and that this is what people want because governments are repeatedly democratically elected on a mandate that prioritizes economic growth.

This approach to progress is embodied in many national finance ministries and in some parts of the global institutions of financial governance, such as the International Monetary Fund. It underpins the 'Washington consensus' on economic policy (Stiglitz 2002).

Within social science there is much debate as to the type of social arrangements that best deliver economic growth. A major focus of the discussion has been as to whether countries with the markets that are most 'free', or where markets are carefully regulated and subordinated to other social institutions, actually deliver on this. In particular, this involves analysing the contrasting nature and implications of different types of production, welfare, and regulatory regimes (Barro 1998; Hall and Soskice 2001; Kenworthy 2004). However, there are several challenges to this conceptualization of progress. These include whether untrammelled competition has social costs

that need to be set against the benefits of rapid economic growth, and whether it leads to happiness (Oswald 1997; Layard 2005). Is human well-being, equality, or human rights more important?

Equality

An alternative approach to progress is viewed through the lens of justice. This approach prioritizes justice, equality, and human rights rather than material improvements in living conditions and welfare. Various traditions articulate this issue in slightly different ways, including: justice (Sandel 1998; Rawls 1999); equality (Phillips 1995; Holli 1997); rights (Paine 1984; Kymlicka 1991, 1995); human rights (Peters and Wolper 1995; Woodiwiss 1998); citizenship (Marshall 1950); equal opportunities and equity (Acker 1989; Shaw and Perrons 1995); freedom and capabilities (Sen 1999; Nussbaum 2000); democracy, political rights and civil liberties (Gastil 1982); and recognition (Taylor et al. 1994; Honneth 1996; Fraser 1997). While there are many approaches to the notion of progress that have a justice framing, it is possible to group many of them into two categories – equality and rights.

The framing of progress as equality is a key part of the socialist and social democratic tradition (Bobbio 1997). This is a more collective and less individualist framing of justice than the others, according less priority to the individual and more to groups and collectivities. There are variations within this frame including: whether equality is conceptualized as an opportunity or an outcome; which domains and practices are included; whether it is limited to 'excessive' inequality; and how difference is addressed.

Equality may be understood either as an outcome or as an opportunity. Equality of outcomes is the stronger programme; equality of opportunities addresses processes and procedures which may possibly, but not necessarily, lead to greater equality in outcomes. For example, the attempt to increase equality of opportunity by equal treatment laws may reduce discrimination but may also be insufficient to produce an equality of outcome in the absence of structural change (Hoskyns 1996). This equality of outcome usually requires the transformation of both social systems and legal processes.

The principle of equality is often selectively applied. This equality may be regarded as a legitimate outcome in matters of longevity, where class and ethnic differences are often considered unjust. It is more commonly discussed in the economic domain (for example, in the debates over narrowing the gender and ethnic pay gaps) than in civil society where diversity is more often preferred. Further, there are some issues for which equality is considered marginal rather than

important (Phillips 1999). Some forms of inequality are regarded as illegitimate because they are 'excessive'. For example, social exclusion and poverty may be regarded as unjust because they are extreme or 'excessive', but not inequality in all its forms; social exclusion is a weaker understanding of inequality (Lister 1998).

Inequalities are often complexly entwined with differences. There is a question as to whether equality requires sameness and the use of a single standard, or equal recognition and the valuation of different contributions, or a larger and more profound transformation (Fraser 1997; Rees 1998). The equal valuation of different contributions is a step away from traditional interpretations of equality that involve a single universal standard. The notion of cosmopolitanism requires mutual respect for different ways of life rather than the adoption of a single universal standard as to what is best (Held 2004; Beck 2006).

Equality is potentially the most radical of the framings of progress. In practice, its application as a principle is often hedged with caveats and limited to specific processes, domains, and practices.

Human rights

In the rights-based approach to justice, every individual is regarded as having inviolable rights, the realization of which constitutes a just society. Each person has an equal entitlement to a specific set of rights. The tradition is predominantly individualist, with the valuation of the rights of individuals positioned as more important than the average welfare of the society as a whole. It ranges from a relatively narrow focus on civil liberties, such as freedom of speech, and political rights, such as free elections (Gastil 1982), to a wider concept of citizenship, which involves socio-economic as well as political and civil rights (Marshall 1950). In its privileging of the individual over society, rights can be interpreted as representing a Western, rather than a universal or global, approach to justice, although this is contested (Woodiwiss 1998).

The notion of rights itself has several variants, including human rights and civil rights (Ferree et al. 2002a), though today human rights predominate in political discourse. There are many theoretical and philosophical interpretations of the longstanding rights-based tradition of justice (Banks 1981; Paine 1984; Wollstonecraft 1992 [1790]). According to Rawls (1999), justice is the overarching framework for all conceptions of progress and the first virtue of social institutions. He considers that each individual has an inviolability that overrides everything else, including the average welfare of the rest of society. Rawls's approach to justice involves a rejection of utilitarian theory in

which the justice of a larger number of people can outweigh the injustice and disadvantage of a few individuals. His approach requires that every individual receives the basics as an underpinning of justice. In this way Rawls's 'social contract' approach to justice prioritizes an equal minimum level for all over the welfare of a whole society.

In the current wave of globalization, the human rights interpretation of justice is becoming increasingly important. This draws on a longstanding rights tradition (Banks 1981; Paine 1984; Wollstonecraft 1992 [1790]; Berkovitch 1999) as well as on some components of the equality framework (Peters and Wolper 1995; Woodiwiss 1998). The most important current statement on human rights is that issued by the UN after the end of the Second World War, the Universal Declaration of Human Rights (UN 1948). This claim, endorsed by all governments in the world, states that these rights are in principle universal and not particular. However, this early UN statement on human rights has since been reinterpreted, extending and clarifying its content. The implementation of a rights-based (especially a human rights) approach to justice and progress is often made via a juridical framework. It is through the law, courts and lawyers that human rights are made available to individuals and groups of individuals.

Although there is a component of equality within the human rights approach, not least equality in accessing these rights since they are regarded as universal, this is a limited conception of equality. It is a minimalist and threshold conception – a relatively low threshold is set and must be passed. Beyond that, the framework has nothing to say.

However, the framing of human rights as universal and measured against a single standard is contested by notions of group rights, the equal valuation of different contributions, and by cosmopolitanism. Rights are not always and only linked to individuals: they may also be constituted as group rights, or as the right to a way of life, which intrinsically involves a group or community (Kymlicka 1991, 1995). This implicitly recognizes that there are different standards in relation to which rights can be claimed. The example used by Kymlicka is that of the First Nation, or aboriginal Indians, in Canada, and their collective rights to the use of certain tracts of land that differ from those belonging to the rest of Canada's citizens. A parallel issue is articulated in theories of equal rights in relation to gender, where the concern to respect difference leads to such formulations as the equal valuation of different contributions. However, there is a question as to whether such respect implies an acceptance of practices that might be considered harmful to certain minorities. There is a tension between universalism and particularism in the specification of equality and human rights, even though the traditional interpretation of these has tended to imply a single universal standard.

Human development, well-being and capabilities

A further project, variously named human development, well-being or capabilities, challenges a focus solely on economic development and growth, but is equivocal about equality. This approach to progress replaces a focus on income with a broader conception of human development and well-being. The intellectual inspiration underpinning this approach is the work of Amartya Sen (1999), while broader support comes from practitioners in the international development community and more recently from academics. There is an increasing divergence within this approach between an outcome-oriented project rooted in the international development community and a philosophically-oriented project focused on the concept of capabilities which is separated from that of functionings.

When embedded in the United Nations Development Project (1990), this alternative approach to development promoted an approach to human well-being that required more than just income; outcomes of longevity and education were the preferred form of development. This challenge to the narrowness of the goal of economic growth that had been held up by the institutions of global financial governance such as the International Monetary Fund (IMF) and the World Bank was at least partly successful. The adoption of the UN Millennium Development Goals, which offer a synthesis of human and economic development, by the IMF, the World Bank and OECD among others, represents a modest global political success on the part of this challenge to neoliberal conceptions of economic growth.

Capabilities are the 'substantive freedoms' to 'choose a life one has reason to value', while functionings are 'the various things a person may value doing or being', according to Sen (1999: 74–5). The distinction between capabilities and functioning parallels the distinction between opportunities and outcomes. One of the strengths of the capabilities approach (that it is open to democratic attempts to name and prioritize capabilities) is also a weakness. The flexibility and openness to political pressure in the definition of the list of capabilities mean that a wide range of interpretations of capabilities is possible. The focus on capabilities rather than on functionings deliberately opens the door to choice, but thereby makes possible a choice of inequality as a way to obtain a difference. Opportunities, conceptualized as substantive freedoms and capabilities, are hard to operationalize and to measure. Because the door is deliberately opened to choice, it is thereby opened to the possibility that people may choose inequality through their choice of a form of difference

that is linked to inequality. Choice is prioritized over equality. By contrast, the UNDP approach to capabilities problematizes choice: 'Real opportunity is about having real choices – the choices that come with a sufficient income, an education, good health and living in a country that is not governed by tyranny' (UNDP 2006). In this way, certain contexts are taken as key to providing capabilities. The focus shifts to outcomes (rather than opportunities) which are easier to measure against a common standard. The interpretation of this school of thought as developed by the UNDP, with its focus on a wide range of outcomes that are relevant to human development and well-being, is the one preferred here.

Competing projects: neoliberalism and social democracy

The different conceptions of progress – high personal income, human well-being, equality, and human rights – do not necessarily contain accounts of the means to reach these goals. Sometimes they are implied, but in many cases the means to reach these ends are contested. Would prioritizing economic growth raise incomes most effectively, even if at the expense of lesser equality or human rights? Would deepening democracy most effectively promote equality and human well-being, but at the expense of more rapid economic growth? Are there trade-offs between the different goals, or not? How are these combined in different projects in the world?

While there are many projects to reach these goals, neoliberalism and social democracy are the most comprehensive in vision and the most relevant today (Giddens 1998; Held 2004; Harvey 2005). While neoliberalism and social democracy presume modernity, and disagree over the form that modernity should take, other projects promote some aspects of premodernity, as is often the case in religious fundamentalisms. Other projects include human rights. Some have partial rather than comprehensive visions, for example feminism, cosmopolitanism (Beck 2006) and environmentalism (Yearley 1996; Cudworth 2003). Some are hybrid projects – for example, the US Bush Presidency, 2001–2009, combined neoliberalism with Christian fundamentalism – while the 'cosmopolitan universalists' combine social democracy with human rights (Held 2004), and the anti-globalization movement combines anti-neoliberal capitalism, environmentalism and feminism. This book focuses on the contrast between the two major projects, neoliberalism and social democracy.

These projects sometimes become embedded in governmental programmes and sometimes in actual social formations. The extent

to which these visions are institutionalized and implemented varies significantly. Projects can be primarily located in civil society, or may become embedded in governmental policy programmes or in actually existing social forms, both large and small. A civil society project usually aims to become the dominant state programme in order to shape actual social relations and institutions, although with varying degrees of success.

Neoliberalism elevates the notion of market effectiveness into a guiding principle for action and attempts to reduce the level of state intervention into the economy, prioritizing the individual over collectivism (Brenner and Theodore 2002; England and Ward 2007). As an intellectual project its current forms draw on the work of Hayek (1960) and Friedman (1962), which argued that freeing the market from state controls was the best way to ensure economic growth, which in turn was believed to deliver human well-being, freedom, democracy, and civil liberties. The project grew in strength during the 1980s, but has a much longer heritage; here the term neoliberal is extended back in time. In the 1980s the neoliberal programme was taken forward by the US and UK governments under Reagan and Thatcher and by global financial institutions, becoming known as the 'Washington consensus', and then spread globally as a result of International Monetary Fund (IMF) conditions on loans to poor countries including 'structural adjustment'. The policies included cutting back state welfare expenditure; the reduction in or deregulation of worker protections and benefit payments for those out of employment; the privatization of publicly owned industries, utilities and services; the expansion of the market into previously non-marketized arenas of the global commons such as the genome; and the substitution of the market as an alternative form of governance to democracy in specific areas, for example welfare provision (Brenner and Theodore 2002; Harvey 2003, 2005; England and Ward 2007). In practice, the record of neoliberalism on economic growth is contested (Stiglitz 2002). The drive to increase incentives to work shifts the balance of power, leading to increased inequalities which then compromise human-well-being (Oswald 1997; Wilkinson 2005).

Social democracy aspires to govern societies democratically, avoiding excessive inequality, promoting human as well as economic development, and enabling minorities as well as majorities to enjoy their human rights. Social democratic projects commit to the provision of education, health and care for those in need, in order to deliver human well-being for all, whether employed or not (Esping-Andersen 1990). There is a commitment to developing policies across a wide spectrum in order to deliver social justice and to reduce inequality. It is considered appropriate for the state to intervene in

the running of the economy through regulation not only to prevent market failure, but also to engage in redistribution; the state legitimately taxes and spends in order to deliver its policies.

Social democratic projects vary significantly in the extent to which they promote state or collective ownership as mechanisms to govern the economy, whether they adopt Keynesian macro economic management to reduce the severity of recessions or merely aim for stability. There has been both a retreat (Callaghan 2000) and a transformation (Kitschelt 1994) of social democratic projects into new forms as a response to the reduction in the traditional base of electoral support in male manual workers in manufacturing industries (Przeworski and Sprague 1986), dealignment in class voting practices (Crewe et al. 1977), and changing external circumstances such as globalization (Held 1995). There has also been a slow transition of the social democratic project towards the full inclusion of the concerns of gender and other minorities which is ongoing. Some forms of the project now include full employment for women and an end to discrimination against women and minorities, though a full engagement with ethno-national issues of citizenship and migration is far from complete. Neoliberal critics consider that state intervention compromises economic growth and thereby other goals.

This description of the projects of neoliberalism and social democracy has so far been a summary of ideal types and aspirations. The implications of the projects as they enter governmental programmes and become embedded in diverse social formations can be quite different.

While the self-description of neoliberalism focuses on diminishing governmental interventions into the economy in contrast with social democracy, in practice neoliberalism is associated with the greater expansion of state interventions in other domains than social democracy. In particular, neoliberalism is associated with the greater development and deployment of state violence and associated forms of coercion than is social democracy, for example, in the propensity to go to war, the build up of military capacity, and the use of prisons to contain criminality and maintain social order. So while neoliberalism appears to laud a small state, this is only in relation to the economy; in practice neoliberal governments simultaneously develop a large coercive state to maintain the domestic social order and position in the global state system. In comparing neoliberalism and social democracy, it is important not to confine the analysis to the intersection of the polity with the economy, but also to include other domains including violence.

While there is widespread consensus that the USA is a major example of the neoliberal project and Sweden of the social democratic, the

boundary between neoliberalism and social democracy is contested, with some arguing that Britain's New Labour government since 1997 constitutes a new form of social democracy (Giddens 1998) and others arguing that the extent of its use of the market principle means that it is effectively neoliberal (Arestis and Sawyer 2005). The debate concerns a number of issues regarding the state's role in securing social justice. These include the shift away from state ownership of industries and services; away from direct provision of public services by the state to being merely guaranteed by the state but delivered by the market; the development of active labour market policies, such as compulsory counselling and targeted training, to achieve full employment; and away from a goal to reduce inequality to that of reducing social exclusion and the provision of equal opportunities. The move away from state ownership and the provision of goods and services to their regulation by the state (Majone 1996) is not necessarily inconsistent with a social democratic tradition, though the reduction in the role of the state is considered by some to be a move towards neoliberalism. The emphasis on the employment and education of individuals may be interpreted either as a shift to a neoliberal accommodation to global capital (Taylor-Gooby 1997; George 1998; Brine 2006), a shift from a Keynesian welfare state to a Schumpeterian workfare state (Jessop 1999), or in keeping with a social democratic tradition that prioritizes full employment (Giddens 1998, 2001; Crouch 1999), where an appropriate response to globalization is to invest in people's human capital through state initiated training and education (Reich 1993; Quadagno 1999; Esping-Andersen 2002). These changes may well be an accommodation to a changing global environment, but full employment under decent conditions for all without coercion and state ensured access for all to education, health and care and a decent living standard, are among the hallmarks of social democracy. The shift in the conceptualization of the goal of 'equality' to that of 'social inclusion' (Giddens 1998) potentially softens the core principles of the social democratic project (Lister 1998), as does reduced concern with increased inequality caused by the growth in high level earnings and wealth from housing capital, and the evasion of taxation and regulation by private equity forms of capital (Murphy 2007), although the attention to poverty somewhat mitigates this. On this range of concerns, the UK is best considered to be situated on the boundary between social democracy and neoliberalism.

A similar debate addresses whether the EU is best considered neoliberal (Young 2000) or social democratic, which is complicated by the narrower remit of this polity, which excludes welfare payments and the different construction of its democratic processes (Majone 1998). The conclusion of this debate drawn here is that the

major division in the world today is one between a more neoliberal USA and a more social democratic EU. The contest between the varieties of modernity of these two global hegemons is crucial for the future of global arrangements.

Contesting concepticons of progress

How is it possible to adjudicate between these contesting conceptions of progress: economic development, human well-being, equality and human rights? Are these issues to be determined by philosophers, or is it a matter of politics, with the strongest forces winning, or a matter of rational argumentation and evidence-based research? Is there a single universal standard, or will there always be particular standards for different cultures and communities? The tension between universalism and particularism runs through all of these framings of progress: between a concept of progress that is universally applicable and one that always varies by social location. Is universalism merely a disguise for new forms of imperialism, colonialism, or Westernization? The postmodern critique of modernity argues that a universally relevant concept of progress is inherently impossible. However, it can also be argued that universal standards are needed, since exceptions can be manipulated by the powerful. How, in an emergent global era, might all voices be involved in determining what global standards should be?

Is there a philosophical grounding of the decision between either a universal or community-based grounding? On the one hand, liberalism and universalism appear to offer a plea to a free-floating form of reason that is universal, drawing on a Kantian heritage (Rawls 2005). There is a claim to universally valid truth, though this usually assumes a coherent individual as the seeker/knower. On the other hand, communitarianism appears to offer grounding in the particular standards of a specific community (Taylor 1994; Sandel 1998). The latter implies that truth is always partial and situated, that we are limited by the communities in which we are located, and that there is always social situatedness and a particularity of values and knowledge (Haraway 1988). In place of the Enlightenment tradition that made universal claims to knowledge, has emerged a postmodern scepticism of the validity and usefulness of the grand 'metanarratives' linking the knowledge and progress that constituted its core components (Lyotard 1984).

Of course, both polar extremes are untenable. Many have sought a resolution or compromise, either by refining the procedures for an assessment of justice claims (Habermas 1989, 1991; Benhabib 1992), or by integrating the concerns of the individual and the community

(Kymlicka 1991, 1995). Habermas (1989, 1991) seeks a resolution by attempting to establish universally valid procedures by which truth may be established, utilizing the dynamics within an assumed desire to communicate to drive the process, and locating it within an idealized situation of equality of contribution. However, by such a location Habermas, despite his intentions, situates rather than universalizes the conditions for truth, since the conditions of free and equal contribution are actually socially specific, not least in their presumption of the implications of democratic involvement. Benhabib's (1992) attempt at overcoming the same dualism by demanding a focus on the other has similar strengths and weaknesses to that of Habermas despite her attempt to move further on (Hutchings 1997). Benhabib seeks to avoid commitment to the communitarian stance, by making an appeal to the ostensibly universally valid criteria of judgement of recognizing the standpoint of the other. But the process of recognizing the standpoint of the other is not natural and automatic, but depends upon socially variable conditions. Thus, Benhabib merely displaces the problem of universalism onto these new procedures for judgement, which are not sufficiently universal to be adequate to the task demanded of them. The act of 'recognition' requires a social process of assessment as to what constitutes the same as or different from oneself. By contrast, Bauman (1991, 1993) simultaneously rejects both poles and with them the search for certain foundations for contemporary ethics and political projects.

But despite the philosophical angst, there are nonetheless many projects that promote alternative conceptions of progress. How should they be understood? Are they best understood as predominantly political? There are protestors who oppose the priorities for globalization as proposed by the world's financial institutions, who are met with organized state and police power, as in the Seattle riots (Klein 1999). There are political struggles within global institutions, for example, coalitions of poor countries preventing the World Trade Organization from adopting certain types of liberalization of world trade that they consider would adversely affect the poor.

Today, many projects engage simultaneously with both knowledge and power, drawing on and deploying scientific research within and alongside political engagement. This can be understood as the development of 'epistemic communities' (Haas 1992) or 'public Sociology' (Burawoy 2005). 'An epistemic community is a network of professionals with recognized expertise and competence ... an authoritative claim to policy-relevant knowledge ... a shared set of normative and principled beliefs ... shared causal beliefs ... derived from their analysis of practices ... shared notions of validity ... and a common policy enterprise' (Haas 1992: 3). Burawoy (2005) refers to the practice of public Sociology, in contrast to professional Sociology, critical Sociology and

policy Sociology. This is a Sociology that engages with contemporary issues, researching questions that emerge in civil societal struggles, which draws on the other three Sociologies, not least professional expertise, and is engaged in projects of social transformation, the pursuit of progress. There are many examples of the intermingled nature of politics and science, in which findings from research are central to the struggles over the pursuit of competing projects, including the best way to invest for development (Stiglitz 2002) and the dangerousness of emerging genomic technologies (Winickoff et al. 2005). These draw on the notion that truth is never permanently established even if it temporarily appears to be (Latour and Woolgar 1979), but is instead constantly subject to challenge and to doubt (Habermas 1987 [1981]).

In global arenas there have been several significant and successful challenges to the standards against which global progress is to be measured and in more than one direction. A change from economic growth towards a capabilities understanding of progress has been occurring within global institutions as a consequence of this mix of intellectual and political struggle. In the 1980s the clear goal of the world's financial institutions was economic growth. By 2000, in the UN Millennium Declaration, the World Bank, IMF and OECD additionally supported a capabilities approach. The eight Millennium Development Goals were to: eradicate extreme poverty and hunger; achieve universal primary education; promote gender equality and empower women; reduce child mortality; improve maternal health; combat HIV/AIDS, malaria and other diseases; ensure environmental stability; and develop a global partnership for development (UN 2005). A change in the list of UN-recognized human rights occurred in 1993 as a result of a similar mix of political agitation and research-based evidence (Peters and Wolper 1995). This was to include violence against women as a violation of women's human rights. The potent mix of a global feminist coalition and research on the extent of violence against women was crucial to this change in what were ostensibly 'universal' human rights.

With globalization, the definition of the good life and the policies to promote it are increasingly contested at a global level. Global institutions and the political and civil societal spaces they generate constitute an increasingly important terrain on which these struggles take place. There are appeals to both scientific evidence and to democratically expressed popular priorities as bases for the legitimacy of arguments. Global institutions around the UN have revised their stated goals as a consequence of these processes. There has been a shift in emphasis from a framing of progress as an increase in income to one of capabilities, while the definition of universal human rights now involves explicit reference to women's human rights. At the same time, in a perhaps contrary direction, global financial institutions have

promoted economic growth, and military force has been deployed by some polities in pursuit of particularistic goals.

Conclusions

One of the aims of this book is to adjudicate rival claims about progress on the basis of evidence and theory that go beyond philosophy. The concept of progress is not outmoded, as alleged by some postmodern critics. Yet there is no single and universally agreed upon definition of progress, rather there are many competing framings of the project. Thus, a search for a foundational basis for a detailed list of the characteristics of the good life would be in vain. While there is no single foundation for standards of progress, the formulation, encoding and institutionalization of concepts of progress in international conventions and agreements, especially those orchestrated by the UN, proceed apace. This is not the same as a global or universal agreement. Nevertheless, these activities do have consequences. There are active processes of claims-making about what constitutes progress and the proper goals of public policy. In a global era there is renewed interest in claims pitched at the level of the universal. In an era of globalization and increasing valuation and practice of democracy the contestation over the content of the concept of progress is taking new and more global forms. The contested choice of economic growth, or capabilities and well-being, or justice-based considerations of equality or human rights, affects public policy at both global and national levels.

Here, a complex realism is adopted, in which each knowledge claim is underpinned by a set of theoretical and empirical components, each of which is part of a network of knowledge claims. It is a knowledge claim rather than a value claim because of this underpinning. This is not a foundationalist claim, since the theoretical and empirical underpinning is contestable and challengeable. The 'real' can never be known for certain; not even if the best scientific procedures are followed. The concept of complex realism building on critical realism combines the notion that there are procedures by which knowledge claims are contested (subject to refutation) and can be improved with that of uncertainty, in that they can never be known absolutely. In complex realism, the testing of knowledge claims against a network of theories and empirical evidence can lead to a reduction in the errors in knowledge.

Many issues ostensibly posed as ones of value often make implicit claims as to how phenomena are interconnected. Many

claims made about the good life, progress, and human well-being are testable to a considerable degree by empirical evidence because they are claims about associations and connections between phenomena. One of the aims of this book is to assess the processes and types of social system that best realize the good life, according to different formulations, addressing its framing as economic growth, human development, equality, and human rights. When do they map onto each other? When do they diverge? What forms of social organization and social development, which varieties of modernity, are associated with each? How general a set of arguments can be made, universal or particular? This book provides evidence of the implications of one dimension of social life inequality for another, thereby reducing the speculative element in some of the debates. Chapter 9 in particular uses comparative data to measure progress in a range of countries according to the different definitions identified here.

Multiple Complex Inequalities

Introduction

Equality matters not only because it is a major contemporary framing of justice and progress, but also because inequalities affect the different forms and speed of economic and human development. Key issues include: how to theorize multiple and intersecting social inequalities in addition to class; how to theorize the relationship between difference and inequality; and the implications of multiple complex inequalities for the analysis of progress and modernity.

Why multiple inequalities? Class is not the only significant inequality. Inequalities are also associated with gender, ethnicity, racialization, nation, religion, able-bodiedness, sexual orientation, age, generation, linguistic community, and more. These inequalities affect the differences between forms of modernity as well as the key dynamics of social change.

Why complex inequalities? Unequal social relations involve difference as well as inequality. Some aspects of the different activities may be positively valued, while others will be regarded as unjust. It is this complicated combination of inequality and difference that the concept of 'complex inequalities' is intended to capture. Complex inequalities are here defined as constituted by the simultaneity of difference and inequality, going beyond the conventional treatment of these as alternatives.

Multiple and intersecting inequalities

While class has traditionally been seen as the main axis of social inequality, this is insufficient. Gender and ethnicity are also important forms of inequality, as can be the case with disability, religion, age and sexual orientation (it is illegal to discriminate on grounds of gender, ethnicity, disability, faith, age, and sexual orientation in the EU: see the European Commission 2007a). While the diversity of social inequalities is widely documented, they are infrequently integrated into macro level social theory. Specialist areas of social science have produced extensive descriptions and analysis of specific inequalities, for example, in the sub-disciplines of gender studies, ethnic and racial studies, and disability studies; however, these have not yet been fully integrated into social theory.

In order to include multiple complex inequalities in addition to class at the centre of social theory, several theoretical developments are needed. The conceptualization of each of the main institutional domains of economy, polity, violence, and civil society needs to be re-thought so as to include and make visible complex inequalities in addition to class. Each of the complex inequalities needs to be theorized as a separate system of social relations, as a regime of inequality spelling out the ontological depth of these regimes. Class is not reducible to economics, nor ethnicity to culture; rather each regime of inequality involves the economy, polity, violence, and civil society. The theorization of multiple regimes of inequality is a further challenge – to go beyond reducing one form of inequality to another, or restricting the account to description.

The concept of the economy, which is often restricted to marketized monetized activities, needs to be widened to include non-marketized non-monetized work if it is to capture gender and ethnic relations. If it is not broadened in this way, then other forms of economic activity, such as unpaid domestic care-work that is an important part of the constitution of gender relations (Oakley 1974; Becker 1981; Delphy 1984) and slavery that was an important part of the constitution of ethnic relations (Walvin 1992), will be omitted from the analysis. If the unit within which inequality is considered is widened from one country to the whole world and inequalities between generations are included, then new forms of inequalities become visible, such as global warming, which has had stronger effects on the poor South rather than the rich North of the world (Roberts and Parks 2007) and on future generations.

The inclusion of non-marketized economic sectors causes problems for some of the most frequently used measures of economic inequality, in particular income inequality. Comparing the income of employed

people is relatively straightforward, generating accounts of class, gender and ethnic economic inequality among workers, with measures of the wage spread and the gender and ethnic pay gaps. But how is an unpaid domestic care-worker, often but not always a woman, to be treated in such an approach to economic inequality? Is she to be ignored since she does not have her own earned income? Such an approach is obviously unsatisfactory but is implied in the quite common practice of comparing the income of households rather than individuals, thereby making invisible any gender inequalities within the household (as in most of the studies of economic inequality reported in Chapter 3). Is her domestic care-work left out of focus by centring the analysis on her earned income, asking what proportion of men's earnings are earned by women (a measure used by the UNDP), thereby explicitly treating the lack of income from domestic care-work as a component of gender inequality? Should unpaid domestic care-work be treated as a positively valued activity in its own right? Or is it a key part of gendered economic inequalities?

The conventional concept of the state is too narrow to grasp some key forms of institutionalized politics and governance concerning gender and ethnicity. The broader concept of polity includes a wider range of entities, including transnational polities such as the European Union, and also organized religions, which can be important in the governance of gender and ethnic relations. The conventional operationalization of the concept of democracy focuses on free elections, free political parties, free association, free speech, and the right to bodily integrity such as the right of *habeas corpus* (not to be subject to arbitrary detention). Using these criteria most, though not all, countries can be considered democratic today. However, effective access to power requires a presence in the key arenas of decision making, such as in parliament. If a presence in parliament were to be added to the operationalization of the concept of democracy, then women and minoritized ethnic groups do not have political equality as yet. If the right to bodily integrity were to make visible gender issues, such as women's freedom to control their bodies in sexual and reproductive matters such as abortion and contraception, then there is not yet political equality for women.

Violence needs to be added to the conventional set of institutional domains of economy, polity and civil society, since it is so important in the structuring of gender, ethnic, national, and religious inequalities. Violence is not merely an instrument of power, but can also be constitutive of social relations. The processes of deployment and regulation of violence in both collectively organized and interpersonal forms have important implications. These forms include

not only the armies of the state but also domestic violence, sexual assault, harassment, lynching, 'ethnic cleansing', and terrorism. The use of violence by dominant groups against women and minoritized ethnic, sexual, and religious groups is a further indicator of inequality.

Civil society is a domain of social creativity, where there is a development of new ideas and social practices, including various forms of association, non-governmental organizations, social movements, and non-state forms of power struggle (Gramsci 1971) and intimacy. It includes but is not confined to issues of culture, including the media, the arts, sport, and knowledge creation. Whether different participation in these activities constitutes inequality or a valued difference is again an issue in these areas. Nevertheless, the imbalance between social groups in decision-making activities in civil society may often be considered an inequality. Who decides what constitutes news, which leisure activities are to be funded and put on prime-time television, and who makes decisions in trade unions and other associations?

Complex inequalities: difference, inequality and progress

In deciding what counts as inequality there is a troublesome complication: when is something a positively valued difference and when is it inequality? This issue lies at the heart of many disputes about what constitutes progress; what to some is a reduction of a negatively valued inequality, to others might constitute a reduction in a positively valued practice. Rather than forcing a choice, it is better to recognize that most social relations contain both inequality and valued differences. The term 'complex inequality' is used here to signify this simultaneous presence of inequality and positively valued difference.

Complex inequalities potentially constitute a challenge to the concept of progress insofar as there are multiple standards to evaluate what is progress. There are three ways of thinking about equality in this context. First, is to identify a single standard against which inequality is measured. A second position entails equally valuing different contributions. A third approach is that of transformation, whereby the whole system is changed, with all groups and the standards attached to them restructured.

The first position argues that there is or can be a single agreed standard against which to identify inequality. The UN Universal Declaration of Human Rights, which declares that equality in accessing these rights should be universal, exemplifies this position.

A single standard of equality is often implied in monetary economic inequality, where differences in income and wealth are considered to be inequalities. It is implied in the concept of democracy, where the equality of each vote is considered important. Such a conception of equality measured against a single standard is common in the analysis of class relations, where matters of economic and political equality are often at the forefront of the analysis. The feminist vision of de-gendering (Lorber 2000, 2005) implicitly endorses this position, even though a question remains as to its universal application. In practice, the legal dimension of the equality strategy of the EU is based on 'equal treatment' thereby endorsing agreed standards. Indeed some standards, such as equal pay for women and men, may constitute standards that are already held by women as well as by men. While the identification of inequality may appear obvious through the lens of class analysis in relation to inequalities in income and wealth, in the case of complex inequalities other than class, such as ethnicity and gender, where inequality and difference are more obviously present simultaneously, this is not so simple. Some forms of variation are open to alternative interpretations as either difference or equality: for example, a segregated pattern of labour between domestic care-work and waged labour may be a valued difference or an unwelcome inequality or both.

The second position positively values difference (Spellman 1988; Young 1990) and diversity, and assumes the possibility of equally valuing different practices (Taylor et al. 1994). In the desire to move beyond the over-simplifying notion of a single standard against which to measure inequality, there has been a move to recognize and value difference (Young 1990; Taylor 1994; Tronto 1994; Calhoun 1995; Hobson 2000). Young (1990) argues for the recognition of cultural difference – the denial of respect for those who are culturally different and for their ways of life is a problem that needs a political remedy. She argues for the recognition of groups as the bearers of these cultures within the political system, rather than recognizing only the individual of liberalism. This theory of justice ontologically privileges groups over individuals. In contrast to Lorber's (2005) call for de-gendering, Young argues for the deepening of institutions that promote respect for group differences. There are two main problems with this approach. First, in practice, the institutionalization of difference has often entailed inequality in some way. An example here is that of the performance of unpaid domestic care-work by women. This may be a highly valued activity (Tronto 1993), however, it can be inconsistent with the activities necessary to obtain equal pay under certain circumstances (Joshi and Paci 1998). Second, the strategy of

'recognition' has a problematic tendency to lead to the reifying, essentializing (Ferree and Gamson 2003), or ontologizing (Felski 1997) of difference. It can embed differences ever more firmly. The focus on specific identities makes it difficult to engage with change and cross-cutting inequalities. The dilemma becomes how to recognize difference while avoiding the trap of essentialism (Ferree and Gamson 2003).

There have been many attempts to reconcile, merge, hybridize, or otherwise go beyond the dichotomization of sameness and difference approaches to equality (Scott 1988; Kymlicka 1995; Fraser 1997; Holli 1997). One resists a settled focus on identity (Braidotti 1994); a second focuses on sameness in some domains and difference in others (Council of Europe 1998); a third posits a process of transformation of existing standards and their associated institutions (Fraser 1997; Rees 1998). In the first approach, Braidotti (1994) emphasizes the fluidity and changeability of cultural forms by utilizing the metaphor of the 'nomadic' subject to resist settling into established modes of thought and behaviour. She prefers the perspective of difference in order to avoid simply embracing existing identities. However, such a distancing from actually existing social practices runs the risk of rendering the position too abstract to have much practical substantive meaning (Felski 1997; Squires 1999). A second approach allows for equality through sameness in one domain and equality with difference in others (Council of Europe 1998; Verloo 2001). Equality through sameness is specified in the 'equal participation of women and men in political and public life' and 'the individual's economic independence', and education, while equality through equal valuation of different contributions is specified for the family and care-work. However, this is only possible if the links between different domains are loose. If the gender practices in different domains are coupled tightly, it may not be possible to have common standards in one domain and different standards in another.

The third approach to equality requires transformation (Fraser 1997; Rees 1998; Squires 2005). In this perspective, a transition from inequality to equality implies the transformation of the social institutions and standards in which the groups are involved. Transformation entails new standards agreed across diverse social groups that are themselves restructured. As social relations are transformed, then new standards develop. This is an approach that is classically adopted in socialism. There can be no significant practical restructuring of inequalities without the transformation of the social relations that themselves produce the standards against which equalities are measured.

Modernity? Postmodernity? Not yet Modern? Varieties of Modernity?

Introduction

Are we now postmodern, rather than modern, or still premodern in some respects? Are there stages to modernity, so that we are now in high or late modernity (Giddens 1991), reflexive or second modernity (Beck 1992) or liquid modernity (Bauman 2000)? Are there multiple modernities, with quite different principles of modernity (Huntington 1998; Eisenstadt 2002)? Or varieties of modernity, sharing key features but with different paths of development (Hall and Soskice 2001; Schmidt 2006, 2007)?

The answers to these questions depend on the definition of modernity, whether complex inequalities are brought into focus, and whether different types of modernity can be distinguished. The definition of modernity used here draws on the classics, from Marx and Weber to Durkheim and Simmel, inflecting them with contemporary social theory. Bringing complex inequalities, and especially gender, into focus challenges conventional accounts of modernity. Rather than a singular modernity, varieties of modernity are identified.

It is necessary to reconsider the definition of modernity, to rebuild from its classic origins, and to address forms of inequalities that the classics did not fully consider. Five components of modernity are considered: free wage labour; the state monopoly of legitimate violence; rationalization; individuation; democracy and human rights.

Modernity or postmodernity?

Is the concept of postmodernity more appropriate than that of modernity for the twenty-first century (Lyotard 1974; Harvey 1989; Kumar 2005)? Does postmodernity imply that knowledge is so situated and contextualized by particular social groups that no general social theory is possible? Does the inclusion of multiple complex inequalities and cultural diversity mean that the concept of modernity should be rejected as too simplistic and replaced by that of postmodernity? Does recognition of the divergent values and preferences of particular social groups and cultures challenge the vision of a universal conception of modernity (Taylor et al. 1994; Calhoun 1995; Felski 1995; Bhambra 2007; Schmidt 2007)?

Is it appropriate to link modernity with progress, or is the 'Enlightenment' confidence in the possibility of progress misplaced (Lyotard 1984)? Modernity is accused of bringing the Holocaust (Bauman 1989), the destabilization of the environment, high levels of inequality, and the threat of nuclear annihilation. Is it better to reject any link between modernity and progress, and prefer instead an ethical position of distance from such a commitment, articulated as postmodern ambivalence (Bauman 1991)?

However, it was rare that classic social theorists simply equated modernity with progress. They were almost always ambivalent, aware of the negative as well as positive potential of any changes. The double-edged nature of modernity, providing both freedom and also new forms of disciplinary constraint, runs deep in much classic sociological theory (Wagner 1994). For example, Marx saw increased poverty before revolution and socialism, with free wage labour providing both freedom from personal bondage as well as increased discipline, while Weber saw rationality as not only the development of the human capacity for knowledge but also as an iron cage of bureaucracy which narrowed the human range of action. The conceptualization of progress is highly contested and should not be equated with modernity; but classical social theory did not make this mistake.

The recognition of multiple forms of inequalities and differences has been absorbed into postmodernist criticism of modernist analysis. There are potentially many different baselines against which to measure equality. But it does not follow that postmodernism is the best answer to this analytic challenge. The multiplicity of inequalities is not new to a global era, indeed in Simmel's work individuation resulting from diverse webs of affiliations was central to his understanding of modernity. The standards against which inequality and progress are measured are contested, but that is not the same as abandoning such a project as if there were incommensurability.

The challenges posed to social theory and to the simpler forms of modernization theory need to be answered, but there are other ways. One is to re-work the concepts of modernity, moving beyond a false singularity, recognizing the still existing premodern, and theorizing the varieties of modernity. The challenge to the simpler concepts of social system needs to be addressed; the conceptual tools needed to do this can be drawn from complexity theory, as will be shown later.

Late, second or liquid modernity?

Also going beyond modernity is a series of writers who think we have reached not postmodernism, but a late stage in the development of modernity – late or high modernity (Giddens 1991), reflexive or

second modernity (Beck 1992, 2002) and liquid modernity (Bauman 2000). These writers have introduced issues of choice and reflexivity, intimacy and family, into the analysis of modernity.

According to Giddens and Beck, we are now more reflexive, more able to knowingly make the decisions that shape our lives. Rather than fixed traditional patterns, there is choice. This analysis is led from an interpretation of the changes in intimacy (Giddens 1992) and the family (Beck 1992, 2002), which are positioned more centrally to social changes than has been common in social theory. Giddens and Beck are right to name intimacy and the family as areas of significant social change, but their analysis of this abandons the approach that they have used for other social relations, neglecting much of the considerable social science work on gender relations that explains these changes in the same way as changes in any other set of social relations. Their move into the language of choice and reflexivity leaves behind much of the heritage of social theory. This is a mistake. Bauman (2000) similarly focuses on change for individuals, but is less focused on the family and intimacy, suggesting that in liquid modernity there is a change from solidly structured social relations to fluidly changing social relations. Bauman goes beyond Giddens and Beck in noting explicitly that the appearance of choice for individuals is not really choice in an unequal society. He is right to point out that choice is better addressed as a personal experience, a superficial appearance, rather than as a reduction in constraints.

All three, Giddens, Beck and Bauman, write as if there were a single modernity. There is no reference to differences between countries. In particular, there is no reference to the differences between the social democratic reorganization of gender and family relations and those in more neoliberal countries. Bauman writes as if all of modernity is becoming neoliberal. But there are differences, with the social democratic version of modernity different from that of neoliberalism. This book explores these differences rather than treating the West as if it were one.

Multiple modernities?

A further response to the challenge of diverse social forms and inequalities to the paradigm of modernity is that there are several forms of modernity, not just one. Much early work on modernization assumed that there was a single form of modernity, in which variations were minor and theoretically insignificant. The presumption of a singular form of modernity can be challenged without abandoning the concept of modernity. There are two ways of conceptualizing the

diversity of forms of modernity: multiple modernities (Huntington 1998; Eisenstadt 2000) and varieties of modernity (Schmidt 2006, 2007).

The concept of multiple modernities rejects the notion of a single path of modernity (Huntington 1998; Eisenstadt 2000), rather there are multiple alternative modernities each with its own distinct set of values and practices. Modernity is not the spread of Westernization during processes of globalization, but instead is autonomously developed in different locations around the world. The multiple modernities approach assumes a radical dissimilarity between the forms of modernity. These differences are seen to lie especially in the realms of culture and religion, with an incomparability of value systems between different cultures (Eisenstadt 2000) and different civilizations (Huntington 1998). These approaches aim to overcome a perceived ethnocentric bias in traditional analyses of modernity as emanating and derivative from Western social practices. However, in compensating for Western bias these authors postulate such radical discontinuities that they erode any common basis for the concept of modernity. This position articulates a relatively thin conceptualization of modernity, rooted in cultural values at the expense of economic, political and scientific processes where greater commonalities in trajectories of change might be found (Schmidt 2006). The theorists of multiple modernities rely rather too much on the cultural dimensions of different modernities, neglecting commonalities such as the development of science and market economies (Schmidt 2006). This poses the question of the precise definition of modernity – how should it be characterized and distinguished from premodernity?

Not yet modern?

Some of the social forms that have recently come to be interpreted as variously postmodern or aspects of multiple modernities are instead better conceptualized as not yet modern. This is made clear when complex inequalities are brought into focus.

Many of the classical sociologists, including Marx, Weber, Durkheim and Simmel, constructed dualisms of before and after modernization, the pre-modern and the modern. This dualism was centred on industrialization and its associated transformations in the organization of society. The transition to modernity was located variously with the development of the mode of production (Marx 1954); rationalization (Weber 1948, 1968); differentiation (Durkheim 1984); and the increased complexity of the web of social relations (Simmel 1955). Modernity involves free wage labour (Marx), the monopolization of legitimate violence by the state (Weber), rationalization (education, scientific

development and secularization) (Weber), individuation (Simmel), and democracy and human rights (Therborn).

In some important respects we are not yet modern, the project of modernity is not yet complete. This is because in several critical domains, for some sets of social relations other than class, the transition to modernity is not yet complete. When complex inequalities, especially gender, are brought into focus, no country is yet fully modern, but rather a mixture of premodern and modern elements. Where there is not yet free wage labour, as for example where there is domestic labour or forced labour, there is not yet modernity in the economy. When significant numbers of women are dependent housewives, there is not yet modernity. When the state does not have a monopoly of legitimate violence in a given territory, as when there is uncriminalized violence against women and ethnic and other minorities, then the state is not yet modern. No country as yet has free wage labour for all of women's work, the effective criminalization of gender-based and ethnic-based violence, and secularization, though many are in the process of transformations leading in these directions. The argument that modernity has been achieved or surpassed rests upon the false assumption that there is one dominant axis of social inequality. Taking complex inequalities seriously challenges the classic approach to modernity. The simultaneous existence of modern and premodern social forms in the same country challenges conventional forms of social system analysis.

Varieties of modernity

Classic social theory, from Marx to Durkheim to Simmel, was often centred on a single transition to industrialization and modernity. The debate on this issue has continued, both backward looking to these processes historically in the North and forward looking to these processes today in the South (Kerr et al. 1960; Lipset 1960), though with many refinements in the most recent texts (Inglehart 1997; Inglehart and Norris 2003). While the impact of modernization occurs across the whole range of social life (Wilensky 2002), from human development (Sen 1999) to citizenship (Marshall 1950), a key issue has been whether economic development leads to democracy. By contrast, a quite different sociological tradition has considered political events as key to the divergence between different paths of development (Esping-Andersen 1999), although it has not always been theorized using the concept of path dependency (Moore 1966; Skocpol 1979; Korpi 1983; Esping-Andersen 1990). In this perspective, the nature of industrial societies is critically shaped by political

processes especially involving states, which lead to different paths of development. Rather than one unfolding process of modernization, there are several paths to and through modernity. Indeed, it has been argued that there is no inevitability that economic development will necessarily lead to democracy, but rather that the form of political governance depends upon the balance of political, especially class-based, forces during industrialization (Moore 1966).

This type of approach is used in the 'varieties of capitalism' approach to differences in the organizational form of market economies (Hall and Soskice 2001; Yamamura and Streeck 2003). It is also implicit in analyses of the implications of different political events in the transition to industrialization, as in the work of Moore (1966) on the different implications of the balance of class forces during industrialization for outcomes of either democracy or dictatorship, and subsequent scholarship on the implications of states and revolutions for the nature of class society (Skocpol 1979), and class alliances at critical moments for the form of welfare state (Korpi 1983; Esping-Andersen 1990). Different routes through industrialization generate different balances of social forces that can lead to divergent outcomes – temporality and sequencing make a difference. These may be the alternatives of dictatorship or democracy (Moore 1966), or different forms of welfare state regime (Esping-Andersen 1990). Rather than one unfolding process of modernization, there is more than one path to and through modernity. In this perspective the nature of industrial societies is seen as critically shaped by non-economic processes, often political ones. The theorization of this range of forms was taken forward by analyses of path dependent rather than unilinear forms of development (Moore 1966; Mahoney 2000; Pierson 2000). The question of the significance of the distinctiveness and nature of the different varieties of modernity can then be addressed more clearly. This question is posed anew in the context of globalization, as to whether the differences between paths of development are eroded by global processes.

There is more than one way of identifying varieties of modernity. Within the varieties of capitalism school, Hall and Soskice (2001) distinguish between liberal market economies and coordinated market economies. Within the welfare state literature, Esping-Andersen (1990, 1999) makes a three-fold distinction between liberal, conservative corporatist, and social democratic forms of welfare state regimes. Within the gendered literature on welfare states, Lewis (1992) makes a distinction based on the extent to which men are the breadwinners and women are the main carers. These typologies are based on different institutional locations: industrial relations, welfare state, gender relations. A more comprehensive typology needs to integrate not only these three, but also violence.

Here, the major varieties of modernity are neoliberalism and social democracy. In addition some social relations are not yet modern, so there is a need to retain the distinction between modern and premodern.

Defining modernity

In order to proceed further in the analysis of modernity, postmodernity, premodernity, multiple modernities, and varieties of modernity it is necessary to more precisely delimit what is meant by modern in each of the main areas of social organization: economy, polity, violence, and civil society.

Free wage labour

The development of free wage labour is a key aspect of modernity. Transforming labour power into a commodity that is sold on the market is a critical part of the development of capitalism (Marx 1954). The commodification of labour power is a key component of the transition from a feudal to a capitalist mode of production. The relations of production between serf and lord in feudalism were more personal in nature, embedded in a web of obligations and power, than those between proletarian and bourgeoisie.

The transformation of labour power into the commodity form involved a double-edged process of both increased discipline and increased freedom (Wagner 1994). It required increased discipline in following the routines of mass labour in the factory, for example longer hours of work increased the relevance of time-keeping (Thompson 1963). It increased and polarized social and economic inequality. Yet it increased some forms of freedom by narrowing the bonds tying the worker to the governing class to those of the sale of their labour power, releasing them from the personal bonds of servitude under feudalism.

The reduction in personal bonds to an employer increases workers' potential for the development of political consciousness and action. Workers have the civil societal and political space to develop alternative ideas and form the associations that underpin the development of various forms of collective action. Marx saw the development of capitalism as progressive, partly in itself and the new forces of production that were unleashed, and partly because of its potential for the next transformation of social relations to socialism and communism. The link between capitalist economic development and political action postulated by Marx is widely supported by contemporary social science (Rueschemeyer et al. 1992). There have

been many nuances and subtle theoretical developments as to the nature of the link and the conditions under which it takes different forms (Gramsci 1971; Habermas 1989).

However, Marx restricted this analysis to class relations, leaving out of focus forms of inequality such as slavery and other forms of forced and non-marketised unfree labour together with the implications of the entry of women into free wage labour. Free wage labour is a hallmark of modernity, not only for class relations but also for gender relations and other complex social inequalities. Until labour is free wage labour, we are not yet modern.

State monopoly of legitimate violence

Weber's (1947) definition of the modern state is a body that has a monopoly over legitimate violence in a given territory. The modernization of the state is a process during which the state accrues this form of power to itself, concentrating decisions over its utilization in its increasingly centrally organized body, shifting away from the dispersal of this form of power among feuding barons and roving militias.

This definition of a modern state is widely adopted in contemporary social science (Giddens 1985). Indeed the development of states in Europe over the last thousand years can be described in terms of the de facto concentration of power, especially violence, in the state (Tilly 1990). This analysis runs parallel to Elias's (1994) theory of the civilizing process, in which there is a decreasing use of violence in civil society and a developing state monopoly as the civilizing process proceeds. Foucault (1997) goes further, suggesting that the use of brute force by the state is replaced by disciplining in the modern world.

However, the state does not have a monopoly over legitimate violence or all violence in the contemporary era. When complex inequalities, such as gender and ethnicity, are brought into focus it becomes clear that there are considerable amounts of violence over which the state neither has a monopoly nor seeks to have a monopoly. The existence of a considerable amount of gender-based violence, from domestic violence to rape (Krug et al. 2002), and ethnic-based violence, from racial harassment to ethnic cleansing (Mann 2005), which the state condones by failing to effectively criminalize it, contradicts the notion that contemporary states are modern. While the state does not have a monopoly of legitimate violence by its non-criminalization of significant amounts of gender-based and ethnic-based violence, the state is not yet modern.

Rationalization

Rationalization is key to Weber's (1948, 1968) conception of modernity. Through this process, traditional and charismatic forms of authority give way to rational, legal, and bureaucratic forms. There is a process of disenchantment; a turning away from religion to secularism, an increase in education and in scientific knowledge.

Education is the field in which the process of rationalization has occurred to the greatest extent around the world. The massive increase in educational institutions, the proportion of the population who are educated, and the length of time spent in education have been marked features of the last century. Increased education is a global phenomenon, even though there are significant differences in the content and amount between countries. The narrowing (and in some countries reversing) of the gender gap in education is a major reduction in one kind of complex inequality, though class and ethnic differences remain.

The development of scientific modes of knowledge production might be regarded as the best expression of the process of rationalization in the modern world, as the most quintessentially modern way of thinking, but there are caveats. The constant critique and rejection of previous forms of knowledge are hallmarks of scientific method and this involves challenges to existing scientific claims as well. It is a form of rationalization that takes a near global form (Schmidt 2006) and possesses enormous authority (Haraway 1997). The contemporary public questioning of science has been interpreted as a form of reflexive modernization (Beck 1992); it is not a simple rejection of rationalism, but rather the bringing to bear of a range of forms of knowledge on the output of institutions dedicated to scientific development (Wynne 1996).

The decline in religion associated with secularization has occurred in many developed countries, but not all (Bruce 1996; Norris and Inglehart 2004). While Europe has in general seen a decrease in religiosity, a decline in attendance at churches and an increase in secularism, this is not uniform (Gorski 2000). The USA by contrast, while developing an advanced economy and sophisticated institutions of education and science, has seen little fall in the religiosity of its population (Inglehart 1997). In some places there has been a shift in the content of beliefs away from traditional religions towards New Age spirituality rather than to conventional forms of secularism (Heelas and Woodhead et al. 2004). Further, the rise of various forms of fundamentalism within Christianity (especially in the USA), Islam, Hinduism and Judaism, likewise contradicts any simple rationalization thesis (Marty and Scott 1993). The tenacity of religious belief systems raises serious challenges to the notion that contemporary Western

countries are all modern, if secularism is taken as a key feature of modernity. Nevertheless, despite the exceptions, there has been a decline in religiosity in developed countries. The difference between the USA and the EU in their levels of and trends in religiosity constitutes a significant divergence in trajectories within the West.

Individuation

Increasing individuation was seen by Simmel (1955) as the key to modernity. Simmel's understanding of difference and inequality was not restricted to the great social cleavage of class. Rather, he envisaged modern social relations as highly complex and differentiated – instead of one dominant set of social relations there is a multiplicity. This gives rise to a highly individuated social order. However, this does not mean anarchic individualism. Instead there are complex webs of affiliation, with people connected to many others in myriad ways. Social life is conceived as a web of group affiliations.

Simmel differentiates between primitive and advanced thinking and forms of sociality. In the former the circumstances and affiliations due to family and kin are dominant, while in the second 'each individual establishes for himself contacts with persons who stand outside this original group-affiliation, but who are "related" to him by virtue of an actual similarity of talents, inclinations, activities, and so on. The association of persons because of external coexistence is more and more superseded by association in accordance with internal relationships' (Simmel 1955: 128). It becomes a matter of choice as to with whom one is affiliated. It becomes possible for intellectual and educational interests to bring together a new community. He suggests that while before the Renaissance social differentiation was based on either self-interest or emotion, afterwards intellectual and rational interests came to be the more common basis of groups. Higher, more modern, forms of association are those based on rationality rather than simple external characteristics. The modern person belongs to many groups (as compared with earlier times), this being a hallmark of culture. These groups include family, occupation, citizenship, social class, clubs, and many more. The more groups with which a modern person is affiliated, the more individuated this person becomes, because few if any other people are likely to have the same patterns of affiliation. The more groups of which a person is a member, the more attributes they possess. This gives rise to uncertainty rather than to the security of the previous mode. Conflicts between those groups of which an individual is a member encourage that individual both to make adjustments and also to become assertive.

While Simmel sees individuation as a general characteristic of modernity, some have seen this as restricted to Western modernity, while other modernities place the state, community, and family above the individual, though this is perhaps most usually seen as the instrumentalization of culture to defend political authoritarianism (Thompson 2000; Barr 2002).

Simmel (1955, 1984) notes that women are in the process of becoming modern, just reaching the point of experiencing the crossroads of affiliations at which individuality begins. The analysis of individuation is developed in the work of Giddens (1992) and Beck (2002), including the development of reflexive biographies as a consequence of changes in the economy and family, with implications for gender relations. But individuation for women is not yet complete.

Democracy and human rights

Democracy is not included in the classical texts of social theory; as since it was not fully developed at the time that they were writing, it is unsurprising that it was not regarded as a marker of modernity. But in the twenty-first century, when democratic practices are widespread and the aspiration to democracy near-universal, democracy is widely regarded as a hallmark of modernity. A significant part of modernization studies empirically investigated the links between economic development and social and political development, often finding a close association (Kerr et al. 1960; Lipset 1960; Inglehart 1997; Inglehart and Norris 2003; Norris and Inglehart 2004) although sometimes it was seen to be mediated by other factors such as the level of inequality (Bollen and Jackson 1995; Muller 1995a, 1995b) and the direction of the causality from economic to political has been challenged (Ersson and Lane 1996; Leftwich 1996, 2000).

However, the definition of what counts as democracy is highly contested, in particular the relationship between procedural practices and the representational outcome for social inequalities (Held 1995; Phillips 1995; Markoff 1996; Potter et al. 1997; Pitkin 2004). The conventional approach focuses on formal procedures, especially voting, rather than the outcome, such as the proportionate presence of social groups in parliament. Since the presence of women in parliaments makes a difference to the policy outcome (Thomas 1991; Norris 1996a; Wängnerud 2000), the conventional definition of democracy is in need of revision to include their parliamentary (or congressional) presence.

Human rights are likewise not included in the classical texts of social theory as markers of modernity for similar reasons, though they are noted in many texts on political philosophy from the eighteenth century onwards (Paine 1984 [1791]; Wollstonecraft

1992 [1790]). Human rights became a marker of modernity in the period after the Second World War, in the European rejection of the Holocaust and nationalist militarism that had overridden the interests of individuals in the name of the purity of ethnic-nationhood (Therborn 1996). These are encoded in the United Nations Universal Declaration of Human Rights as a fundamental principle of all civilized nations (UN 1948). The interpretation of human rights is highly contested. Are they merely specific to Western countries with their individualistic ethos, or have they become hybridized so as to include Asian and other cultures that are traditionally less individualistic (Woodiwiss 1998)? Is their early formulation gendered, not universal (Nussbaum 2000)? Do they become inclusive of gender inequality insofar as they include sexual and reproductive rights and the right to be free from gender-based violence (Peters and Wolper 1995)? Today, democracy and human rights are markers of modernity, albeit that their meaning remains highly contested.

Globalization

Introduction

What is globalization? Are the distinctiveness of local social arrangements and the capacities of nation-states to act democratically being eroded? Is the world being homogenized into a single US-led modernity? Or are some political institutions resilient to these pressures? How does making multiple complex inequalities visible change the analysis?

The conceptualization of globalization demands an engagement with the changing implications of spatiality and temporality, with space-time compression, an increased rate of flows of people, objects and symbols around the world, and the non-linearity of these processes. It requires re-thinking the concept of society, its boundedness and processes of formation, and the relationships between social systems in the world. Definitions of globalization are diverse and often encompass many different social processes. Globalization has been identified and conflated variously with internationalization, universalization, Westernization, supraterritoriality (Scholte 2000), Americanization, and neoliberalism. In particular, 'globalization' has often been treated as if it were effectively the same as the expansion of capitalist markets (Crouch and Streeck 1997). The conflation of globalization and capitalism is unhelpful

because it does not allow for the significance of any social relations other than capitalist ones and, further, precludes analysis of the political actions that might be facilitated by the increased global inter-linkages that might be in opposition to the growth in power of global corporations. It is better to have a definition that is minimalist in the sense that it does not include the causation nor name the processes involved. This is helpful in that it avoids conflating the causation of globalization with its definition and allows for the possibility of more than one wave of globalization with different causes.

Globalization is here defined as a process of increased density and frequency of international social interactions relative to local or national ones. This definition closely follows the definition of Chase-Dunn and colleagues (2000: 78): 'changes in the density of inter-national and global interactions relative to local or national networks'. A more fulsome, though similar, definition of globalization is that used by Held et al. (1999: 16) 'A process (or set of processes) which embodies a transformation in the spatial organization of social relations and transactions – assessed in terms of their extensity, intensity, velocity, and impact – generating transcontinental or interregional flows and networks of activity, interaction, and the exercise of power'. Globalization is a transformative process in which the units within the process change as well as the overall environment. Several dimensions can be distinguished: the extent of networks of relations and connections; the intensity of activities and flows through these networks; a temporal dimension of the speed of the interchanges; and the impact of these phenomena (Held et al. 1999).

While many focus on globalization as a predominantly economic or politico-economic project, it is important to consider violence and civil society as well. Rather than seeing globalization as a single process, it is more appropriate to distinguish between different types of global processes, including the global flows of capital, trade and people, the development of global institutions, networks and hegemons, and global civil societal waves.

One simple difference in approaches to globalization is between those who think that there is such a process and those who do not (Held and McGrew 2002). However, there are further important distinctions. Those who do not think that globalization is a useful framing of analysis include both those who think that there is already a global system and those who think that existing social institutions are effective in resisting such processes. There are four main approaches to globalization. First, that global processes are eroding the differences between societies and exacerbating inequalities. Second, that there are still separate societies that remain resilient in the face of

global pressures. Third, that the world is already global, and has been for a long time. Fourth, that global processes restructure social relations and coevolve with trajectories of development. It is the last position that this book adopts and develops.

Globalization as the erosion of distinctive and separate societies

Globalization is frequently viewed as a process that is sweeping away differences between societies, thereby creating similarity or homogeneity. This is often seen as a negative process that corrodes culture and political autonomy and increases inequality (Martin and Schumann 1997), although there are some exceptions that see globalization as a positive force associated with economic growth and development (Ohmae 1990, 1995).

For Castells (1996, 1997, 1998) the development of globalization is associated with the rise of the information society, which he dates as appearing from the 1970s onwards. The origins of globalization lie in increasing global interconnections that are often linked to new information and communication technologies, such as computers and the internet (Castells 1996, 1997, 1998). These new forms of information flows change the nature of the world through their effects on the economy and the way that politics is organized.

Globalization changes the balance of power between capital and labour – capital is more mobile and can go 'regime shopping', potentially moving to whichever country offers the best opportunities, often seen as low taxation and low regulation (Traxler and Woitech 2000). As a consequence, democratic states can lose their power to globally mobile capital, leading to a reduced capacity to set regulatory and welfare regimes in keeping with democratically expressed priorities. In this way, globalization is understood as a corrosive force that erodes and changes the nature of existing social and political entities, such as societies and states, and especially nation-states (Crouch and Streeck 1997). Globalization erodes, undermines, and reduces the capacity for the autonomous action of nation-states, especially over the provision of welfare, and hence their democracy (Cerny 1995, 1996; Held 1995; Martin and Schumann 1997), through the corrosive power of global financial markets (Strange 1996), and the new balance of power between capital and labour. Globalization exacerbates inequalities within and between countries.

Neoliberalism is a global wave of ideas, politics, and policy practices. This project, which promotes free markets and opposes state regulation of the economy in the pursuit of economic growth, has

come to dominate the powerful global financial institutions (Stiglitz 2002). It is a doctrine that favours private over public ownership, promoting the privatization of public services and utilities such as water and private ownership of the information about genetics that underlies modern biotechnology, summarized by Harvey (2003, 2005) as 'accumulation through dispossession'.

Globalization undermines some aspects of local and national cultures. Large multinational companies promote their products and associated cultures and undermine the distinctiveness of cultures and the authority of traditional ways of acting. For example, McDonalds spreads its fast food and associated unhealthy practices at the expense of local cuisines (Ritzer 1993). Hollywood shapes our cultural values. Globalization is here understood as a process that impacts on economies, polities, and cultures; although they might resist or be resilient to this process.

While providing a powerful critique of recent changes, there are a number of limitations to this perspective. It tends to overstate the newness of these developments, which have a long history; it also tends to overstate the extent to which all polities are undermined; and it tends to underestimate the significance of political and civil societal responses to these processes.

Resistance to globalization

A contrasting approach suggests that political institutions and cultures can be resilient to global processes and that their paths of development have not always been significantly affected. This thesis has been articulated at the level of whole societies, and also at the level of specific political institutions.

It has been argued that the particularity of societies (Eisenstadt 2002), nation-states (Mann 1997) and civilizations (Huntington 1998) is resistant to erosion by globalization. Modernity does not take merely one form, there are multiple modernities with quite different forms. Neither industrialization nor globalization need lead to the erosion of differences (Eisenstadt 2002). Huntington (1998) argues that cultural and civilizational differences are durable, that rather than a homogenization of the world by economic development and increased communications, we are experiencing a 'clash of civilizations'. There are several distinct civilizations whose basis is cultural and religious, with associated core states: Western, Latin American, African (possibly), Islamic, Sinic, Hindu, Orthodox, Buddhist (barely), and Japanese. Huntington argues that while most civilizations are seeking to modernize, they are not necessarily seeking to

Westernize; that it is possible to have modern technology without social patterns that are perceived as Western, and that cultures deeply rooted in civilizations are robust enough to be able to resist Westernization as they modernize. Controversially, he identifies a fissure between the West and Islam, as a result of differences in core civilizational values. There are empirical weaknesses in his argument related to inconsistency in the application of his principles of the classification of civilizations. For example, he considers that the EU and the USA belong to the same Western civilization, but that Latin America does not because of its political culture even though it shares a Christian religion, compromising his classification system that is based on religion. Further, there are many countries that are economically and politically successful while having several ethnicities and religions, further undermining his argument about the centrality of civilizational divides.

A different approach to resistance to globalization is based on the resilience of some economic and political institutions. There are some forms of services that must be locally provided, so are not subject to pressures to send jobs abroad (Hirst and Thompson 1996). In some countries, the configuration of institutions including the democratic system, nature of group representation, structure of policy making, and structure of welfare provision mean that there is less change under pressure from global forces than in other countries. In the countries that are already more liberal, there have been further changes in that direction with a reduction of regulation and state welfare, while in the more social democratic countries of Europe there has been less change (Swank 2002). Further, in some countries there is an active building of new forms of partnerships, pacts, and coalitions in response to global pressures (Hanké and Rhodes 2001).

Already global

The thesis that the world is newly undergoing globalization is challenged by the view that the world became global a long time ago. This is not a challenge to the idea that we live in a global era, but only to the notion that this is new. This has been argued in different ways using world-systems theory and the world society thesis.

The global expansion of capital was described by Marx (1954; Marx and Engels 1967) in the mid-nineteenth century. The drive by capital for new terrains where commodities can be produced and sold has been a feature of the world capitalist system since its origins. Wallerstein (1974) argues that there has been an expanding

world capitalist system since the sixteenth century. Here capitalism is theorized as a world-system, in which states are merely nodes constituted by that system (Wallerstein 1974; Robinson 2001). The analysis centres on the world-system of capitalism as a whole (Wallerstein 1974, 1980, 1989). This system has had a global reach since the sixteenth century, although the process of saturation of all the economic and social relations in the world is still ongoing. States are nodes within this world-system. There can be no concept of autonomous, free-standing societies here, since all social relations are inter-connected through the capitalist world-system, though there are social formations with varying degrees of differentiation from each other. This is both an ontological and empirical claim about globality. This is a theory that privileges the role of capital in explaining social relations and, since capital is global, the analysis of local social formations must also take into account the global formation. This is a theoretical approach that has never lost sight of the need to explain processes of development in the poorer and less industrialized countries of the world, conceptualizing such core-periphery relations as an integral part of the explanation of social relations anywhere.

There are several nuances within world-systems theory, especially in the relationship between the economy and states and the extent to which they are independently causal. World-systems theory started from the position that there was the possibility for a mobility of states up and down the hierarchy of an otherwise stable world-system (Wallerstein 1974). Dependency theory considers that there is no mobility of states within the world system but rather the reproduction of inequalities between the metropolitan and peripheral social formations, that is, the development of underdevelopment (Frank 1975). Robinson (2001) argues that globalization has already produced a developed global capitalist polity beyond specific states, while Chase-Dunn (1998) differentiates global hegemons within the world system. Global commodity chain analysis of the material inequality in a global system focuses on the micro level of the transactions that make up a global capitalist chain. The analysis is of the transfer of value through goods manufactured and distributed through the chain (Gereffi and Korzeniewicz 1993). The concept of a chain can be applied to care-work in the concept of 'global care chains' (Hochschild 2000), where the focus is on mobile caring labour (Yeates 2005), involving the mobility of people as well as the transfer of care.

There are variations in the extent to which different forms of capital are globalized. Finance capital is more globalized than industrial capital, because there is an electronic global marketplace for capital that is different from the relatively more fixed industrial capital. However, even finance capital has a territorial component in the