



# Histories of Global Inequality: Introduction

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## SCRAPING BY

In the 2016 Danish television documentary *Superrich in the Slum*, the Danish journalist Kristoffer Eriksen visits four different developing countries (Bangladesh, Ghana, Kenya, and Nepal), countries with a deep gap between a tiny, super-rich enclave and most of the remaining population.<sup>1</sup> One episode features Ibrahim, a young citizen of Ghana who works in Accra, the country's capital. Ibrahim's work consists of burning various kinds of electronic waste such as cords (mainly shipped in from the West), in order to extract metal that he can then sell on an unregulated market.

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Ibrahim works many hours a day and receives poor remuneration for his work. He is not protected against the health dangers that his job entails. Despite the fact that Ghana is doing much better today than just a few decades ago, Ibrahim has limited access to even the most basic of necessities.<sup>2</sup> Needless to say, he is not particularly optimistic about his future.

The story of Ibrahim should give pause for thought. Whether one believes in the principle of equality of opportunity, the principle of equality of outcomes, or in the principle of substantive human rights for all people, his example certainly raises some deep moral and political questions about justice and fairness. His reality also illustrates four key points in the burgeoning research on global inequality.

Firstly, the most important “choice” in life is place of birth. Indeed, recent research in the field of global inequality (most notably, the work of Branko Milanovic) has demonstrated that today place of birth matters even more than class affiliation.<sup>3</sup> This is one testimony of why a global perspective on inequality is important: Chances in life are (still) highly geographically determined. The young Ghanaian is not poor because he is less entrepreneurial than other people are. In fact, as the development economist Ha-Joon Chang has argued, poor people are often incredibly entrepreneurial and work long hours, as scraping by in life often requires tremendous creativity.<sup>4</sup> Ibrahim is poor mainly because of where he was born and raised.

Secondly, the story of Ibrahim illustrates that inequality cannot be reduced to *economic* inequality (inequality of income or of wealth). While the income difference between him and many living in the Northern hemisphere is substantial, the inequalities also extend to unequal access to health care, to food and food security, to education, as well as to life expectancy, and so on. To use the concepts of Indian economist and philosopher Amartya Sen, inequality is inequality in fundamental capabilities.<sup>5</sup> In terms

<sup>2</sup>See this document by the African Development Bank: [https://www.afdb.org/fileadmin/uploads/afdb/Documents/Generic-Documents/country\\_notes/Ghana\\_country\\_note.pdf](https://www.afdb.org/fileadmin/uploads/afdb/Documents/Generic-Documents/country_notes/Ghana_country_note.pdf) (visited 13 March 2019).

<sup>3</sup>Branko Milanovic, *Global Inequality: A New Approach for the Age of Globalization* (Cambridge, MA: Belknap Press of Harvard University Press, 2016), 125–134; Branko Milanovic, *The Haves and the Have-Nots: A Brief and Idiosyncratic History of Global Inequality* (New York: Basic Books, 2011), 118–123.

<sup>4</sup>Ha-Joon Chang, *Economics: The User's Guide* (New York: Bloomsbury Press, 2015), 258–259; Ha-Joon Chang, *23 Things They Don't Tell You About Capitalism* (London: Allen Lane, 2010), 157.

<sup>5</sup>See, for example, Amartya Sen, *Development as Freedom* (New York: Anchor Books, 2000). An important early work of Sen on the capability approach is his 1979 lecture at

of capabilities, Ibrahim is likely to be less fortunate than many people living in the Northern hemisphere, having fewer chances and opportunities in life and more restraints upon what he can actually do and choose. Göran Therborn distinguishes between resource inequality, vital inequality (inequality in health and in being biological organisms), and existential inequality (inequality in recognition).<sup>6</sup> It is likely that Ibrahim and his counterparts in other countries are unequal not just in terms of resources (lower income and wealth) but also in terms of vital inequality (lower life expectancy due to dangerous working conditions and less access to health care) and existential inequality (recognition). Typologies such as Therborn's can help analytically disentangle the multiple dimensions of inequality. The point is that there are other important dimensions of inequality besides economic inequality. Similarly, global inequality is not just global economic inequality.

Thirdly, the example illustrates another finding in current research on global inequality, namely that inequality not just concerns inequality between poor and rich countries, but that vast inequalities also exist within all countries, including relatively poor countries. Ranked by country inequality in regions, the most unequal region is Latin America, closely followed by Africa, and then Asia.<sup>7</sup> The point with the *Superrich in the Slum* documentary series was to highlight the existence of considerable and growing inequality in some of the poorest countries of the world.

Finally, the example demonstrates that today, when the story of Ibrahim is viewed against the historical backdrop of post-war sentiments of creating a "world without want," these promises have not been met. Immense human suffering and inequality of life conditions stand side by side with historically unprecedented wealth, technology, and productive capacities. This paradox is well known; indeed, it is a defining feature of the contemporary world.

## WHY THIS BOOK?

This book is above all a contribution to existing research on global inequality. It focuses on some of today's most important and promising themes in historical research on global inequality: defences and critiques of inequal-

Stanford. See Amartya Sen, "Equality of What?" in *Tanner Lectures on Human Values*, vol. 1, ed. Sterling M. McMurrin (Cambridge: Cambridge U.P., 1980).

<sup>6</sup> Göran Therborn, *The Killing Fields of Inequality* (Cambridge, UK: Polity, 2013), 48–68.

<sup>7</sup> Milanovic, *The Haves and the Have-Nots*, 31.

ity in history, decolonization, international organizations, gender theory, discrimination and human rights, the history of measurement of inequality, and the history of economic thought. To date, economists have largely dominated the field of global inequality. They have renewed the tradition of Russian-American economist Simon Kuznets and his calculations of distributions of national income, bringing in much new data and longer-term historical perspectives.<sup>8</sup> The aim of this book is to contribute to this burgeoning literature with a historical approach to global inequalities that supplements the economic research literature, demonstrating that many kinds of inequalities operate in different contexts. It takes stock of existing historical research on global inequality to help pave the way forward for a new research agenda.

In order to achieve this aim, we have strived to also open up the thematic scope to other forms of inequality than the strictly economical. The book therefore also contains contributions that deal with histories of discrimination and human rights that shed light on global inequality. In 2015, Philip Alston, the UN Special Rapporteur on extreme poverty and human rights, found “that human rights are absent in the inequality debate.”<sup>9</sup> It was not just a matter of understanding “other dimensions of well-being” that could be “taken into account apart from income and wealth.”<sup>10</sup> The issue was, as Alston wrote to the UN Human Rights Council, that “economic inequalities seem to encourage political capture and the unequal realization of civil and political rights.” This relationship is a two-way street as Alston also argued that “levels of economic inequality in many countries would be lower today in the absence of discrimination.”<sup>11</sup> There is a nascent debate addressing the absence of inequality in human rights discourse.<sup>12</sup> This book has deliberately sought to further bridge this gap. This integration is one important avenue for further research on global inequality. A historical approach offers excellent opportunities to address this and what are also labelled horizontal inequalities or inequalities with a group-based dimension such as “between men and women,

<sup>8</sup> Simon Kuznets, “Economic Growth and Income Inequality,” *The American Economic Review* 45, no. 1 (1955): 1–28.

<sup>9</sup> Philip Alston, Report of the Special Rapporteur on extreme poverty and human rights, A/HRC/29/31, Human Rights Council, 29th Session, 27 May 2015.

<sup>10</sup> Ibid., 4 & 8.

<sup>11</sup> Ibid., 10.

<sup>12</sup> See, for example, Samuel Moyn, *Not Enough. Human Rights in an Unequal World* (Cambridge, MA: Belknap Press, 2018).

between majorities and minorities, between races, between groups of people with different sexual orientations or between generations”<sup>13</sup> (the chapters by Julia Dehm, Sally Kitch, Paul van Trigt, and Steven L. B. Jensen all contribute to this discussion).

The structure of this book balances a thematic approach with a chronological one. The chapters focus on inequality in the history of economic and political thought (Chapters “Historicizing Piketty: The Fall and Rise of Inequality Economics,” “The Demise of the Radical Critique of Economic Inequality in Western Political Thought,” “Products before People: How Inequality Was Sidelined by Gross National Product,” and “Inequality by Numbers: The Making of a Global Political Issue?”), inequality, discrimination, and human rights (Chapters “Inequality and Post-War International Organization: Discrimination, the World Social Situation and the United Nations, 1948–1957,” “‘A Pragmatic Compromise between the Ideal and the Realistic’: Debates over Human Rights, Global Distributive Justice and Minimum Core Obligations in the 1980s,” “Inequality in Global Disability Policies since the 1970s,” and “Protection and Abuse: The Conundrum of Global Gender Inequality”), and inequality in an age of global capitalism (Chapters “Brewing Inequalities: Kenya’s Smallholder Tea Farmers and the Developmentalist State in the Late-Colonial and Early-Independence Era,” “Challenging Global Inequality in Streets and Supermarkets: Fair trade Activism since the 1960s,” “Partnerships against Global Poverty: When “Inclusive Capitalism” Entered the United Nations,” and “Third World Inc.: Notes from the Frontiers of Global Capital”). Many other themes, such as international organization and activism, occur across the chapters. Rather than providing a singular conclusion, this volume is a presentation of interconnectivity in new case studies and research perspectives on global inequality.

While each scholar’s approach to global inequality is historically informed, the book is interdisciplinary, drawing upon regional and national perspectives from around the world. The volume deliberately brings together scholars from different historical disciplines with expertise in the history of ideas, development studies, sociology, human rights, econom-

<sup>13</sup> Philip Alston, Report of the Special Rapporteur on extreme poverty and human rights, p. 4. See also the former UN High Commissioner for Human Rights statement that “Inequalities and discrimination are the defining challenge of our time.” “An Agenda for Equality”, Zeid Ra’ad Al Hussein, UN High Commissioner for Human Rights, statement at the Summit for the Adoption of the Post-2015 Development Agenda, New York, 25 September 2015.

ics, international organizations, and more, in order to capture the multidimensionality and multicausality of global inequalities. This presents a broad range of contexts in a more qualitative way than representation through an aggregated UN data set or a statistical overview allows. The book assesses the dynamics of global inequality through cases that link political histories with other types of histories be they economic, diplomatic, social, or development histories. It contributes to the emerging multidisciplinary historical research on global inequality. It challenges the often more abstract historical narratives and explanations that occur in some of the economic literature and, instead, seeks to explore new and hidden dimensions and “faces” of inequality. Global inequalities are multifaceted, and research needs to be as well. After all, inequality is not just numbers. Inequality is also lived, historical experience.

While the concept of global inequality is rather recent, inequalities among different peoples in different parts of the world of course date much further back. So do the attempts to think and to conceptualize these inequalities, even if national inequality was to become the most prominent theme in the twentieth-century social sciences. This anthology spans the historical development of research on global inequality to examine the current research field of global inequality, arguing that there is ample space for supplementing existing economic and statistical research. More specifically, it makes the case for drawing on more historical, qualitative, political, multidimensional, and actor-oriented approaches to global inequality, and to explore new, fascinating, and important themes.

### THE SUDDEN EMERGENCE OF A NEW CONCEPT?

The history of the emergence of the concept “global inequality” is somewhat spectacular. In just a few decades, it has become a key concept in research and in public debates. To the best of our knowledge, the very term “*global* inequality” (as distinguished from “*international* inequality”) first emerged in the context of the world food crisis of 1972–1975.<sup>14</sup> Well into the 1980s, few people used it. Although a host of studies of world

<sup>14</sup>The concept “global inequality” appears in: Mick McLean & Mike Hopkins, “Problems of World Food and Agriculture: Projections, Models and Possible Approaches,” *Futures* 6, no. 4 (1974): 309–318. On the world food crisis, see: Christian Gerlach, “Famine responses in the world food crisis 1972–5 and the World Food Conference of 1974,” *European Review of History: Revue européenne d’histoire* 22, no. 6 (2015): 929–939.

economic income disparities appeared, global inequality itself did not become a key concept until the 1990s.<sup>15</sup> In the early 1990s, its usage gradually surpassed that of “international inequality,” and then entered into a phase of exponential growth.<sup>16</sup> Today, global inequality has become part of the popular imaginary, as when Oxfam reports that only a handful of rich individuals own as much as the poorest half of the world’s people.<sup>17</sup> Perhaps since 2008 these accounts of global inequality have even become part of what was recently termed “The Inequality Industry.”<sup>18</sup>

To the best of our knowledge, economists were first in coining the concept of global inequality.<sup>19</sup> One pioneer in this research was the Serbian-American economist Branko Milanovic. Milanovic distinguishes between national inequality (inequality among citizens of one country), international inequality (inequality among nations measured as differences in average gross domestic product [GDP] per capita), and global inequality. The latter is inequality among all the world’s people as if they were living within one nation (often calculated using the Gini-coefficient).<sup>20</sup> Other fields picked up the term only after the initial conceptual work by economists. Similarly, the economic version of the term “global inequality” seems the one most typically referred to in popular and political debates. Perhaps this is because, as Pedro Ramos Pinto points out in this volume, “stylized facts,” such as those about a few individuals owning equally as much as the bottom poorest half of the world’s population, easily make headlines in the popular press.

<sup>15</sup> Reinhart Koselleck & Michaela Richter, “Introduction and Prefaces to the ‘Geschichtliche Grundbegriffe,’” *Contributions to the History of Concepts* 6, no. 1 (2011): 1–5, 7–25, 27–37.

<sup>16</sup> Google Ngram search comparing the terms “international inequality” and “global inequality.” The result can only give a hint and is in no way conclusive for what concerns the popularity of the two terms, one reason being that Ngram only contains one version of each book. See, for example, Eitem Adam Pechenick, Christopher M. Danforth & Peter Sheridan Dodds, “Characterizing the Google Books Corpus: Strong Limits to Inferences of Socio-Cultural and Linguistic Evolution”. *PLoS ONE* 10, no. 10 (2015): e0137041. <https://doi.org/10.1371/journal.pone.0137041>.

<sup>17</sup> See, for example, <https://www.oxfam.org/en/pressroom/pressreleases/2017-01-16/just-8-men-own-same-wealth-half-world> (visited 15 March 2019).

<sup>18</sup> Atossa Araxia Abrahamian, “The Inequality Industry,” *The Nation*, 13 September 2018.

<sup>19</sup> No conceptual history of global inequality exists in the current literature.

<sup>20</sup> Milanovic, *The Haves and the Have-Nots*; Milanovic, *Global Inequality*; Branko Milanovic, *Worlds Apart: Measuring International and Global Inequality* (Princeton, NJ: Princeton U.P., 2005).

Rising from almost insignificant status in the early 1990s, within a few decades “global inequality” has now become a key concept in the social sciences and in the humanities. The term is used in the fields of global health, climate change, citizenship, gender studies, migration, water access, international institutions, macroeconomics, and international trade.<sup>21</sup> It has also made an entry into sociology, anthropology, moral philosophy, and epidemiology.<sup>22</sup> Research on global inequality has proliferated within economics. It has done so against the backdrop of a growing interest in national economic inequality after the 2008 financial crisis.<sup>23</sup> Indeed, the policies of austerity in the aftermath of the financial crisis have certainly fuelled the inequality debates

<sup>21</sup> A.J. McMichael, S. Friel, A. Nyong & C. Corvalan, “Global Environmental Change and Health: Impacts, Inequalities, and the Health Sector,” *British Medical Journal* 336, no. 7637 (2008): 191–194; J. Timmons Roberts, “Global Inequality and Climate Change,” *Society & Natural Resources* 14, no. 6 (2010): 501–509; Ayelet Shachar, *The Birthright Lottery: Citizenship and Global Inequality* (Cambridge, MA: Harvard University Press, 2009); Elaine Unterhalter, “Global Inequality, Capabilities, Social Justice: The Millennium Development Goal For Gender Equality in Education,” *International Journal of Educational Development* 25, no. 2 (2005): 111–122; Lucie Cheng & Philip Q. Yang, “Global Interaction, Global Inequality, and Migration of the Highly Trained to the United States,” *The International Migration Review* 32, no. 3 (1998): 626–653; D.A. Seekell, P. D’Odorico & M.L. Pace, “Virtual Water Transfers Unlikely to Redress Inequality in Global Water Use,” *Environmental Research Letters* 6, no. 2 (2011); Andrew Hurrell, “Global Inequality and International Institutions,” *Metaphilosophy* 32, no. 1–2 (2009): 34–57; J.K. Galbraith, “Global Inequality and Global Macroeconomics,” *Journal of Policy Modeling* 29, no. 4 (2007): 587–607; Ajit K Ghose, “Global Inequality and International Trade,” *Cambridge Journal of Economics* 28, no. 2 (2004): 229–252.

<sup>22</sup> Michael Burawoy, “Facing an Unequal World,” *Current Sociology* 63, no. 1 (2015): 5–34; Robert J. Holton, *Global Inequalities* (London: Palgrave, 2014); Kathryn M. Neckerman & Florencia Torche, “Inequality: Causes and Consequences,” *Annual Review of Sociology*, 33 (2007): 335–357; Sylvia Walby, *Globalization and Inequalities: Complexity and Contested Modernities* (Los Angeles: Sage, 2009). Anthropology, see McGill, Kenneth, *Global Inequality: Anthropological Perspectives* (North York, Ontario: University of Toronto Press, 2016). Moral philosophy, see Charles R. Beitz, “Does Global Inequality Matter?” *Metaphilosophy* 32, no. 1–2 (2001): 95–112. Epidemiology, see Richard Wilkinson & Kate Pickett, *The Spirit Level* (New York: Bloomsbury Press, 2009).

<sup>23</sup> In a vast literature, see, for example, Anthony Atkinson, *Inequality: What Can Be Done?* (Cambridge, MA: Harvard University Press, 2015); Thomas Piketty, *Capital in the Twenty-First Century* (Cambridge, MA: The Belknap Press of Harvard University Press, 2014); Milanovic, *The Haves and the Have-Nots*; Milanovic, *Global Inequality*; Joseph E. Stiglitz, *The Price of Inequality: How Today’s Divided Society Endangers Our Future* (New York, NY: W.W. Norton & Company, 2012).



in the West.<sup>24</sup> Even though, it should be added, austerity is by no means a novel phenomenon when viewed through a global lens. It has been a perennial condition in many poor countries prior to 2008 as seen, for example, in the contexts of the Third World debt crisis and the structural adjustment programmes of the 1980s.<sup>25</sup> Here, austerity can be said to often equal these countries' histories as independent nations.<sup>26</sup> The case of austerity certainly calls for a global perspective on inequalities.

## THE DEEPER HISTORY OF GLOBAL INEQUALITY

While the concept of global inequality itself is of relatively recent origin, inequality between “distant people” and “cross-cultural” inequality was an experience long before it became the object of quantification and statistics.<sup>27</sup> If universalistic criteria are relaxed, moving from the all-encompassing globe towards specific cross-cultural or transnational experiences of inequality, there are certainly many examples to turn to. The comparison between Ibrahim from Ghana and people from the North definitely has its historical predecessors. Earlier examples would include, for example, accounts of the “savages” or “uncivilized” people from non-European places in early modern travel literature, such as the ones used by Jean-Jacques Rousseau in his famous treatise on inequality.<sup>28</sup> Historical experiences of inequality certainly predate the Gini-coefficient.

<sup>24</sup> See, for example, Mark Blyth, *Austerity: The History of a Dangerous Idea* (Oxford: Oxford University Press, 2013); Wolfgang Streeck & Armin Schäfer (editors), *Politics in the Age of Austerity* (London: Polity, 2013); Adam Tooze, *Crashed: How a Decade of Financial Crises Changed the World* (London: Allen Lane, 2018).

<sup>25</sup> Sumner B. Twiss, “History, Human Rights, and Globalization,” *Journal of Religious Ethics* 32, no. 1 (2004): 39–70.

<sup>26</sup> This pertinent point was made by the Ugandan legal scholar Christopher Mbazira from Makerere University at the *Roundtable on Austerity and Human Rights* held at Åbo Akademi University, Turku, Finland, 19 November 2015. For a historical exemplification of this, see the Jamaican premier Norman Manley's remark on “the austerities of independence” to the Jamaican Parliament in 1961 quoted in Steven L. B. Jensen, “From this era of passionate self-discovery”: Norman Manley, Human Rights, and the End of Colonial Rule in Jamaica”, in A. Dirk Moses, Marco Duranti, and Roland Burke (eds.), *Decolonization, Self-Determination, and the Birth of Global Human Rights Politics*, (Cambridge: Cambridge U.P., forthcoming).

<sup>27</sup> Siep Stuurman, *The Invention of Humanity: Equality and Cultural Difference in World History* (Cambridge, MA: Harvard University Press, 2017).

<sup>28</sup> Jean-Jacques Rousseau, *Discourse on the Origin of Inequality* (Indianapolis, Indiana: Hackett Publishing Co., 1992).

Indeed, as objects of scholarly inquiry, both inequality and global exchange have long and deep histories. In a Western context, the intellectual history of inequality stretches back to Antiquity and the Roman Era.<sup>29</sup> Similarly, the historical past offers many examples of earlier phases of globalization, such as the European voyages to South and Central America in the fifteenth and sixteenth centuries, and the subsequent centuries of colonization and empire formations.<sup>30</sup>

Inequality was increasingly theorized and problematized in connection with the “double revolution” in the eighteenth century: the Industrial Revolution and the political revolutions of France, the early American Republic, and Haiti. Together with colonization, the Industrial Revolution was the foundation of “the great divergence” where the West increasingly took off from other parts of the world in terms of production and economic growth.<sup>31</sup> The Enlightenment and political revolutions in the eighteenth century ushered in a growing critique of various kinds of inequality.<sup>32</sup> As the German sociologist Ulrich Beck notes, it is relatively late in world history when inequality becomes a political scandal.<sup>33</sup> When it did, inequalities were most certainly perceived in terms that also transcended national borders, as in critiques of the slave trade, of gender differences, and of imperialism. The Enlightenment, however, did not just give birth to new ideals of equality, but also to new ways of addressing and defending inequalities. In his cross-cultural intellectual history of equality, Siep Stuurman has thus demonstrated the rise of “four modern discourses of inequality” in the Enlightenment period: political economy, gender theories, racial theories, and a new philosophy of history concerned with “more and less ‘advanced’ stages of human development.”<sup>34</sup> The point is that

<sup>29</sup> Jon D. Wisman & James F. Smith, “Legitimizing Inequality: Fooling Most of the People All of the Time”, *American Journal of Economics and Sociology* 70, no. 4 (2011): 974–1013.

<sup>30</sup> Jürgen Osterhammel & Niels P. Petersson, *Globalization: A Short History* (Princeton, NJ: Princeton U.P., 2005).

<sup>31</sup> Gregory Clark, *A Farewell to Arms: A Brief Economic History of the World* (Princeton, NJ: Princeton U.P., 2007); Joel Mokyr, *A Culture of Growth: The Origins of the Modern Economy* (Princeton: Princeton U.P., 2018); Kenneth Pomeranz, *The Great Divergence: China, Europe, and the Making of the Modern World Economy* (Princeton, NJ: Princeton U.P., 2000).

<sup>32</sup> On the French and Haitian Revolutions, see, respectively, the chapters by Charles Walton and by Philip Kaisary in the forthcoming volume *Social Rights in History*, eds. Steven L.B. Jensen & Charles Walton.

<sup>33</sup> Ulrich Beck, “Re-mapping Social Inequalities in an Age of Climate Change: For a Cosmopolitan Renewal of Sociology”, *Global Networks* 10, no. 2 (2010): 165–181, p. 167.

<sup>34</sup> Stuurman, *The Invention of Humanity*, 259–260.

not only new ideals of equality saw the light of day in modernity; so did novel forms of legitimizing inequalities. Or, as Pierre Rosanvallon notes, “In the history of equality we find a constant tension between achieved forms of equality and resistance to the egalitarian idea.”<sup>35</sup>

An early proponent of “the egalitarian idea” (for some) was philosopher Jean-Jacques Rousseau. In 1754, he wrote what would become a famous treatise on the historical origins of inequality, asking whether the high level of inequality in contemporary France was in contradiction with natural law.<sup>36</sup> Rousseau’s answer was an affirmative yes, arguing that “natural” inequality in physical terms (due to unequal physical and mental capacities) is vastly exacerbated in society, fuelled by institutions such as property rights, inherited wealth, and various forms of domination and hierarchy sanctioned by positive law (see the chapter by Michael J. Thompson in this volume).

In the nineteenth century, historical research on inequality most certainly became a main theme in the work of Karl Marx. In works such as *Das Kapital*, he traced the historical origins and trajectories of capital, such as the history of the so-called “original accumulation” and the historical connection between the enclosures in British history and the development of an unequal class society.<sup>37</sup> Were either of the two authors concerned with what in today’s language is meant by the term “global inequality”?

It would be misleading to claim that Rousseau was interested in global inequality in the present-day understandings of the concept. He was interested above all in France, not the world. He employed travel accounts, not statistics. He was interested in the lives of “savages” in order to develop his own theory of developmental stages from the state of nature towards society and to criticize power relations in contemporary Europe. With Karl Marx, the main concept he used to capture the essence of inequality was that of class. In this regard, he owed much to the tradition of classical political economy of which he was both an heir and a critic. Marx conceptualized inequality in class-terms and not in individual-terms (as would later be most common in economics). One of the ways he stood out was

<sup>35</sup> Pierre Rosanvallon, *The Society of Equals* (Cambridge, MA & London: Harvard U.P., 2013), 75. For an analysis of new ways of legitimizing inequality in nineteenth-century France, Britain, and the United States, see Chapter 2, especially pages 87–111.

<sup>36</sup> Rousseau, *Discourse on the Origin of Inequality*.

<sup>37</sup> Karl Marx, *Capital: Volume 1* (London: Penguin, 1990), Chapter 26.

that he introduced a concept of class that would transcend national boundaries, as when he and Engels famously encouraged workers of *all nations* to unite. To be sure, Marx did not write about global inequality as such, but his concept of class had an international dimension to it that much of twentieth-century inequality economics did not.

“Global” exchanges certainly proliferated during the nineteenth century. As is well known, the period between 1870 and 1914 was marked by a deep phase of economic globalization.<sup>38</sup> Africa was rapidly colonized, and international inequality between the West and other parts of the world grew, alongside a growing inequality within many Western countries, as in the US “Gilded Age.” In the second half of the nineteenth century, the term “workers aristocracy” emerged.<sup>39</sup> It was a way of trying to capture the unequal living conditions between Western workers and workers in the poorest countries. Similarly, Marxist theories of imperialism from the early twentieth century addressed inequalities between empires and their colonies.<sup>40</sup>

### INEQUALITY WITHIN AND BEYOND THE NATION STATE

Where Marx was concerned with inequality between classes across national and imperial borders, methodological nationalism became the dominant paradigm for much of twentieth-century social science. To the extent that twentieth-century economics was even concerned with inequality and distributional questions, it centred on the nation state. According to contemporary inequality economists, the theme of inequality was neglected in economics for much of the twentieth century (see also the chapters by Eli Cook, Pedro Ramos Pinto and Philipp Lepenies in this volume).<sup>41</sup> An exception was the empirical work on the relationship between growth and income inequality in the United States by economist Simon Kuznets. Kuznets’ legacy became the famous “Kuznets Curve” that depicts the relationship between inequality and growth as a bell curve.<sup>42</sup> In the West, it

<sup>38</sup> Osterhammel & Petersson, *Globalization*, 81–90.

<sup>39</sup> Milanovic, *The Haves and the Have-Nots*, 111.

<sup>40</sup> Rosa Luxembourg, *The Accumulation of Capital* (London & New York: Verso, 2003); Vladimir I. Lenin, *Imperialism, the Highest Stage of Capitalism* (Peking: Foreign Languages Press, 1970).

<sup>41</sup> Piketty, *Capital*, 16.

<sup>42</sup> Kuznets, “Economic Growth and Income Inequality.” Somewhat mistakenly, however, his study was interpreted as a generalizable fact about how successful phases of industrializa-

was not until the 1970s that economists such as Anthony Atkinson and Amartya Sen again took up the theme of inequality in economics.<sup>43</sup> This took place at a time when, as is now richly documented by Thomas Piketty and others, economic inequality was rising in many, if not most, countries.<sup>44</sup> Indeed, there is much evidence that suggests that the 1970s marked a historical watershed in the history of economic inequality. This is especially true from a Western perspective as inequality continued to rise again after the end of what in France was called the *trentes glorieuses*, the 30 glorious years from 1945 to 1975.<sup>45</sup> Research on inequality in economics also enjoyed a renaissance. The work on inequality by economists such as Anthony Atkinson in the 1970s, however, concerned national inequality, not international and definitely not “global inequality.” Similar to economics, most sociology of inequality has applied “methodological nationalism” to study inequality.<sup>46</sup>

Indeed, even today the nation state may very well be the most dominant frame for thinking about inequality in contemporary research. Perhaps one explanation for this is that the nation state remains the most significant site of political intervention in relation to mitigating (or exacerbating) various inequalities. Since the 1960s, the nation state has become a main vehicle for redistribution as well as for recognition in most of the world.<sup>47</sup> With decolonization and the universalization of the principle of state sovereignty around the globe in the post-war era, the world of empires and colonies (and the many kinds of inequalities they embodied) has given way to the nation state as the most significant political organizing unit.

tion would begin with a high level of (necessary) inequality followed by economic growth and equalization. See Piketty, *Capital*, 13.

<sup>43</sup> Anthony B. Atkinson, “On the Measurement of Inequality,” *Journal of Economic Theory*, (1970), 244–263; Amartya Sen, *On Economic Inequality* (Oxford: Clarendon Press, 1973).

<sup>44</sup> Piketty, *Capital*.

<sup>45</sup> Piketty, *Capital*, 11.

<sup>46</sup> Robert J. Holton, *Global Inequalities* (London: Palgrave, 2014), p. 12. Sociological research on global inequality includes (following Holton, *Global Inequalities*, 15): Ulrich Beck, “Beyond Class and Nation: Reframing Social Inequalities in a Globalizing World”, *British Journal of Sociology* 84, no. 4 (2007), 679–705; Beck, “Re-mapping Social Inequalities,” Manuel Castells, *Network Society* (Oxford: Blackwell, 1996); Sylvia Walby, *Globalization and Inequalities* (London: Sage, 2009); Göran Therborn, “Meaning, Mechanisms, Patterns, and Forces: An Introduction”, in Göran Therborn (ed.), *Inequalities of the World* (London: Verso, 2006), 1–60.

<sup>47</sup> Nancy Fraser & Axel Honneth, *Redistribution or Recognition? A Political-Philosophical Exchange* (London & New York: Verso, 2003).

But even if the bulk of research on economic inequality in the twentieth century centred on the nation state, there are notable exceptions. International organizations (at times) did their part to measure inequality between and within nations (see the chapter by Jensen in this volume). In doing so, they helped foster a look at the world as a whole, and not just at individual nations, empires or colonies. While they did not use the term “global inequality,” its present-day connotations would apply. Indeed, a preferred measure in economics today for global economic inequality is still that of the Gini-coefficient, named after the Italian statistician Corrado Gini, who did pioneering work on the topic in the early twentieth century.<sup>48</sup> In this respect, recent accounts of global economic inequality within economics reflect newer developments within data and knowledge production more than they represent a novel way of thinking about inequalities.<sup>49</sup> In another regard, however, a crucial difference remains between seeing the globe as a world of nation states, empires, or colonies, and that of seeing it in singular terms: as one place with unequal distribution among the citizens of the world.

While some strands of historical research have focused on national history, often in a way that was entangled with the process of constructing the nation itself, the historical disciplines incorporated internationalism a long time ago.<sup>50</sup> In the post-war era, this includes imperial and colonial history, international history, world history, comparative history, area studies, postcolonial studies, entangled histories, and multiple modernity

<sup>48</sup> The first work is Corrado Gini, “Sulla misura della concentrazione e della variabilità dei caratteri,” *Atti del Reale Istituto Veneto di Scienze, Lettere ed Arti* (Venice: Premiate Officine Grafiche Carlo Ferrari, 1914) 73, no. 2: 1203–1284. See Milanovic, *The Haves and the Have-nots*, p. 219, for further bibliographic information on Gini. Also see: Lidia Ceriani & Paolo Verme, “The origins of the Gini index: extracts from Variabilità e Mutabilità (1912) by Corrado Gini,” *Journal of Economic Inequality*, 10 (2012): 421–443; Michael Schneider, “Measuring Inequality: The Origins of the Lorenz Curve and the Gini Coefficient,” [https://www.latrobe.edu.au/\\_data/assets/pdf\\_file/0011/130889/2004.01.pdf](https://www.latrobe.edu.au/_data/assets/pdf_file/0011/130889/2004.01.pdf).

<sup>49</sup> This is not meant to disregard the many important new empirical and theoretical insights in the fascinating economic literature on global inequality, such as the concepts of Kuznets waves, location-based inequality, citizenship premium, and so on. See, for example, Milanovic, *Global Inequality*.

<sup>50</sup> See, for example, Casper Andersen & Mikkel Thorup, “Indledning,” in *Global Idéhistorie*, edited by Casper Andersen & Mikkel Thorup (Århus: Baggrund, 2018). On nationalism, see: Benedict Anderson, *Imagined Communities* (New York & London, 1983); Eric Hobsbawm, *Nations and Nationalism since 1780. Programme, Myth, Reality* (Cambridge: Cambridge U.P., 1990).

studies.<sup>51</sup> These internationalist trends have helped pave the way for the more recent rise of what today is termed “global history.”<sup>52</sup> As with the term “global inequality,” the turn to “global history” is hardly thinkable without the appearance of “globalization” and the globalization debates of the 1990s.<sup>53</sup> The current interest in global inequality by historians can be seen against this backdrop.<sup>54</sup> In the fields of intellectual and conceptual history, research on equality and inequality has mainly tended to focus on the West—often with an emphasis on canonical works—and it is only more recently that the field has pivoted towards global history.<sup>55</sup>

<sup>51</sup> On comparative history, see, for example, Heinz-Gerhard Haupt & Jürgen Kocka (eds.), *Comparative and Transnational History* (New York & Oxford: Berghahn Books, 2009); on world history, see, for example, Philip Pomper et al. (eds.), *World History. Ideologies, Structures and Identities* (Malden: Blackwell, 1998); on multiple modernities, see, for example, American Historical Review Roundtable, “Introduction: Historians and the Question of ‘modernity’,” *American Historical Review* 116, no. 3 (2011): 631–637; on imperial and colonial history, see, for example, John Darwin, *After Tamerlane: A Global History of Empires since 1405* (New York: Bloomsbury Press, 2008); on postcolonial history, see, for example, Dipesh Chakrabarty, *Provincializing Europe. Postcolonial Thought and Historical Difference* (Princeton, NJ: Princeton U.P., 2000); on entangled histories, see, for example, Michael Werner & Bénédicte Zimmerman, “Beyond Comparison: Histoire Croisée and the Challenge of Reflexivity,” *History and Theory* 45, no. 1 (2006): 30–50. See Andersen & Thorup, “Indledning,” 20–24, for more references.

<sup>52</sup> Sebastian Conrad, *What Is Global History?* (Princeton: Princeton U.P.).

<sup>53</sup> David Held, Anthony McGrew, David Goldblatt & Jonathan Perraton, *Global Transformations* (Stanford: Stanford U.P., 1999).

<sup>54</sup> The authors of this introduction organized a conference at Aarhus University (Denmark) in November 2016, titled *The Road to Global Inequality, 1945–Present Day: New Historical Perspectives*. The theme of the tenth-anniversary conference of the Global History and Culture Centre at Warwick University was *Global Inequality: A Divided History* (April 2017). Both conferences are indicative of a current trend where historians investigate inequality through a “global” lens. In this introduction, we acknowledge and discuss some strengths and weaknesses of a global approach to inequalities.

<sup>55</sup> See Rosanvallon, *Society of Equals*, but also, for example, Steven Kale, “Gobineau, Racism and Legitimism: A Royalist Heretic in Nineteenth-Century France,” *Modern Intellectual History* 7, no. 1 (2010): 33–61; Brandon Konoal, “Between Aristotle and Lucretius: Discourses of Nature and Rousseau’s Discours Sur L’Inégalité,” *Modern Intellectual History* 14, no. 1 (2017): 1–33; Michael Sonenscher, “Jean-Jacques Rousseau and the Foundations of Modern Political Thought,” *Modern Intellectual History* 14, no. 2 (2017): 311–337. There is also a global history surge in the fields of intellectual and conceptual history. For work on equality, see especially, Stuurman, *The Invention of Humanity*; also see Frederick Cooper, *Citizenship, Inequality, and Difference: Historical Perspectives* (Princeton: Princeton U.P., 2018). For global intellectual and conceptual history more generally, see, for example, David Armitage, “The International Turn in Intellectual History,” in Darrin



If the late nineteenth- and early twentieth-century “first globalization” is testimony to new historical experiences of transcultural inequality, the contemporary concern with global inequality certainly owes much to post-war developments. The post-war era witnessed a new critique of global poverty, a rearticulation of the principle of universal equality, a critique of theories of race, and a political as well as intellectual battle for understanding—and changing—inequalities between people on this globe. Where the Enlightenment period and the subsequent centuries primarily referred to inequality within nations, the post-war era saw a new insistence on addressing inequality on a world scale. This is not to say that global inequality was reversed—far from it—but it was increasingly problematized. This was expressed in the Universal Declaration of Human Rights from 1948, which claimed the equal rights of all people despite their many differences, and in decolonization treatises.<sup>56</sup> It was also expressed in the further expansion of development economics and modernization theory, which put a focus on development in the poorest parts of the world (modelled in a Western image). It was seen in a new rhetoric about eradicating poverty across the globe, and featured in the political speeches of American presidents and in the political projects of the Third World.<sup>57</sup> It was also expressed in the new waves of revolts and insurrec-

McMahon & Samuel Moyn (eds.), *Rethinking Modern European Intellectual History* (Oxford: Oxford U.P., 2014), 232–252; Anthony Grafton, “Forum: a World of Ideas: New Pathways in Global Intellectual History, c. 1880–1930,” *Modern Intellectual History* 10, no. 2 (2013): 347–351; Donald R. Kelley, “Intellectual History in a Global Age,” *Journal of the History of Ideas* 66, no. 2 (2005): 155–167; Samuel Moyn & Andrew Sartori, *Global Intellectual History* (New York: Columbia Samuel University Press, 2013); Martin Mulsow, “New Perspectives on Global Intellectual History,” *Global Intellectual History* 2, no. 1 (2017): 1–2; Margrit Pernau, “Whither Conceptual History? From National to Entangled Histories,” *Contributions* 7, no. 1 (2012), 1–11; Andrew Sartori, *Bengal in Global Conceptual History: Culturalism in The Age of Capital* (Chicago & London: University of Chicago Press, 2008); Glenda Sluga, “Turning International: Foundations of Modern International Thought and New Paradigms for Intellectual History,” *History of European Ideas* 41, no. 1 (2015): 103–115; Bo Stråth, “Towards a Global Conceptual History”, keynote address at National and transnational Notions of the Social, Helsinki, 21 August 2008. Accessed 15 March 2019. [http://www.helsinki.fi/conceptafrica/theory\\_method\\_literature/towards\\_a\\_global\\_conceptual\\_history.html](http://www.helsinki.fi/conceptafrica/theory_method_literature/towards_a_global_conceptual_history.html).

<sup>56</sup> Adom Getachew, *Worldmaking after Empire: The Rise and Fall of Self-Determination* (Princeton: Princeton U.P., 2019).

<sup>57</sup> See, for example, the inaugural address by John F. Kennedy in 1961 (<https://www.jfklibrary.org/learn/about-jfk/historic-speeches/inaugural-address>), or Franklin D. Roosevelt’s “Four Freedom Speech” of 1941, <https://www.roosevelt.nl/fdr-four-freedoms->



tions of colonies that launched a grand decolonization process in the subsequent decades.<sup>58</sup>

Much suggests that the post-war era was particularly important for laying the groundwork for the contemporary concern with global inequality. Current sensibilities towards it predate the emergence of the term “global inequality” itself during the 1980s and 1990s. The battle for greater equality for women and people of colour, the oppressed, marginalized, colonized, and indigenous people of the globe was led by the new postcolonial nations, through civil rights movements and an internationalist new left rising in the 1960s that grew up partly in response to Western geopolitical dominance.<sup>59</sup> On a theoretical level, the post-war era saw the outgrowth of new bodies of thought on international economic inequality between North and South. The latter was expressed through Latin American dependency-theories, theories of “under-development,” of “unequal exchange,” and in “world systems theory.”<sup>60</sup> These theories saw their heyday in the 1960s and the 1970s. They were part of the intellectual foundation when a group of Third World countries in 1974 was successful in pushing through a UN declaration on creating a “New International Economic Order,” which was intended to create more international equality between the North and the South.<sup>61</sup> These different historical processes were linked to the growing concern with international inequality and analyses of why and how some nations (and regions) were poorer than others. They bear witness to a growing preoccupation with world inequalities, even if the very term “global inequality” was not yet employed.

speech-1941 (visited 15 March 2019); for “third world” perspectives, see Vijay Prashad, *The Poorer Nations: A Possible History of the Global South* (London: Verso Books, 2013).

<sup>58</sup> Jan C. Jansen & Jürgen Osterhammel, *Decolonization. A Short History* (Princeton: Princeton University Press, 2017).

<sup>59</sup> C. W. Mills, “The New Left,” in Irving L. Horowitz (ed.), *Power, Politics and People. The Collected Essays of C. Wright Mills* (New York: Oxford University Press, 1963).

<sup>60</sup> On “dependencia,” see: Raúl Prebisch, *The Economic Development of Latin America and Its Principal Problems* (New York: United Nations, 1950); on “under-development,” see: Andre Gunder Frank, *Latin America: Underdevelopment or Revolution* (New York: Monthly Review Press, 1969); on “unequal exchange,” see: Samir Amin, *Le développement inégal—Essai sur les formations sociales du capitalisme périphérique* (Paris: Les Editions de Minuit, 1973); on world-systems theory, see: Immanuel Wallerstein, *World-System Analysis: Theory and Methodology* (Beverly Hills: Sage, 1982); Immanuel Wallerstein, *Africa and the Modern World* (Trenton, NJ: Africa World Press, 1986).

<sup>61</sup> On the NIEO, see the special issue of *Humanity*, 6, 1 (2015): <http://humanityjournal.org/issue-6-1/>.

Furthermore, they also demonstrate the importance of non-Western actors (political and intellectual) in what would be a more global (and, for many, highly welcomed) approach to the histories of global inequalities (see the chapter by Muey Saeteurn in this volume).

The post-war era was a new era of globalization, institutionally anchored in the new international economic and political order laid out at Bretton Woods. Amongst other objectives, one priority of the new post-war institutions was to promote international trade, while seeking to ensure that (some) countries would be cushioned against the most negative effects of an international economy.<sup>62</sup> The process towards more economic exchange sought legitimacy through neoclassical theories of international trade, which claimed that increased trade between richer and poorer nations would lead to equalization in the long term. The dominant Western temporality of international inequality was that of a near-future equalization, an expectation grounded in development and modernization theory, neo-classical trade theory, and the Kuznets Curve.<sup>63</sup> The growing economic exchanges in the post-war era, partly channelled through the activities of multinational corporations, form part of the background for why the very term “global” was increasingly used in the 1970s.

Another important background condition for the present-day concern with global inequality is advances in statistics and data collection within economics in the interwar and post-war era.<sup>64</sup> The work on measuring within-nation economic inequality stretches back to efforts by Vilfredo Pareto around the turn of the twentieth century, and the seminal 1912 article by Corrado Gini.<sup>65</sup> In the period following the Great Depression of the 1930s, the development accelerated, as new economic data on national income accounts were produced (see Lepenies in this volume). An important consequence was that it became possible to compare countries. In 1940, the British economist Colin Clark published a landmark book that

<sup>62</sup> John Gerard Ruggie, “International regimes, transactions and change: embedded liberalism in the postwar economic order,” *International Organization* 36, no. 2 (1982): 379–415.

<sup>63</sup> David Singh Grewal & Jedediah Purdy, “Inequality Rediscovered,” *Theoretical Inquiries in Law* 18, no. 1 (2017): 61–82.

<sup>64</sup> Daniel Speich, “The use of global abstractions: national income accounting in the period of imperial decline,” *Journal of Global History* 6 (2011): 7–28.

<sup>65</sup> Vilfredo Pareto, *Manual of Political Economy* (New York: Augustus M. Kelley, 1971); Vilfredo Pareto, “La courbe de la répartition de la richesse (Lausanne: Université de Lausanne, 1896). See Milanovic, *The Haves and the Have-Nots*, 235 & 240–241, for more bibliographical information on Pareto.

compared the economies of existing states, following up on decades of work.<sup>66</sup> As Daniel Speich notes, “Most of Clark’s figures were rough estimates based on very poor empirical evidence.” The study showed that “more than half of the world population was living in countries with an average income below 200 international currency units—what amounted to less than one-sixth of the average income in the United States. The conclusion Clark drew was a sensation. He stated quite simply that ‘the world is a wretchedly poor place’ and that charitable action was necessary.”<sup>67</sup> As noted, where key contributions to the history of inequality in economic thought from Kuznets and Atkinson mainly centred on the nation state, international organizations such as the UN would also become important actors in producing new statistics on inequality among countries (see Jensen in this volume).

In the 1970s, parallel to the growing economic globalization, a more broadly based global consciousness arose. This was expressed in a new media reality where sufferings in the Third World increasingly appeared on Western television screens: the Vietnam War (the My Lai massacre in 1968), the Biafra War in 1967–1970 (civil war in Nigeria where famine was used as a means of warfare), and the global food crisis in the early 1970s.<sup>68</sup> Global justice, the branch of political philosophy that has international inequality as a theme, also saw the light of day in the 1970s.<sup>69</sup> Indeed, in the 1970s more and more contemporary observers began to speak of “one earth.” As the political scientist John Ruggie wrote in 1975: “technological, ecological, political, economic, and social environments are becoming so globally enmeshed that changes taking place in one segment of international society will have consequential repercussions in all

<sup>66</sup> Colin Clark, *The Conditions of Economic Progress* (London: Macmillan, 1940).

<sup>67</sup> Daniel Speich, “The use of global abstractions,” 7. Quote from Daniel Clark, *The Conditions*, Introduction, here quoted from Speich p. 7.

<sup>68</sup> See, for example, Lasse Heerten, *The Biafran War and Postcolonial Humanitarianism. Spectacles of Suffering* (Cambridge: Cambridge U.P., 2017).

<sup>69</sup> Charles R. Beitz, “Justice and International Relations,” *Philosophy and Public Affairs*, 4, 4 (1975): 360–389. The opening question in his article was this: “Do citizens of relatively affluent countries have obligations founded on justice to share their wealth with poorer people elsewhere?” (p. 360); and later: “In view of increasingly visible global distributive inequalities, famine, and environmental deterioration, it can hardly be denied that this question poses a main political challenge for the foreseeable future” (p. 361). Beitz answered the question in the affirmative, employing the terms “global distributive inequalities,” “global distributive justice,” and “global justice.”

others.”<sup>70</sup> As demonstrated by Peter van Dam in this volume, it was also a decade in which fair trade activists acted on what they saw as injustice on a world scale. The 1960s and 1970s were certainly a formative era for the rise of a transnational (even if not fully global) civil society that today constitutes a key field in battles concerning global inequalities of various kinds, ranging from women’s rights to LGBT rights to Oxfam reporting on global economic inequality.<sup>71</sup> This points to an important research task in unpacking how historical actors have acted on global inequalities, as illustrated by several chapters in this volume (see van Dam, van Trigt, Christian Olaf Christiansen and Jensen).

The very idea (that is so commonplace in contemporary research) of separating out different or specific dimensions of inequality was most certainly also reflected in the 1970s studies of inequality. In the 1975 entry on equality in the German conceptual history magnum opus *Geschichtliche Grundbegriffe*, historian Otto Dann proclaimed that equality is always equality in a certain sense.<sup>72</sup> The same would be the case with inequality. In 1979, Amartya Sen famously asked the question “Equality of What?”, in close dialogue with the political philosophy of John Rawls and his 1971 path-breaking book of political and moral philosophy, *A Theory of Justice*.<sup>73</sup> But even if these specific works point forward by separating out different dimensions of inequality, they mainly remained bound to the nation state.

The recent decades’ explosive growth in the use of the term “global inequality” should also be seen against the backdrop of the overall tendency of the rise in economic inequality since the 1970s. There are notable exceptions, as when one looks at international inequality (measured in terms of average GDP per capita) and finds evidence of international equalization due to economic growth especially in China and India. But the main tendency is that within-country inequality has risen in most countries, that some countries remain way behind others in terms of GDP per capita, and that inequality is very high also in poor or middle-income

<sup>70</sup> John Gerard Ruggie, “International responses to technology: Concepts and trends,” *International Organization* 29, no. 3 (1975): 557–583, 559.

<sup>71</sup> Walby, *Globalization and Inequalities*, 233–238.

<sup>72</sup> Otto Dann, “Gleichheit,” in Otto Brunner, Werner Conze & Reinhart Koselleck (eds.), *Geschichtliche Grundbegriffe: Historisches Lexikon zur Politisch-Sozialen Sprache in Deutschland*, Band 2 (Stuttgart: Klett-Cotta, 1975), 997–1046.

<sup>73</sup> Amartya Sen, “Equality of What?,” John Rawls, *A Theory of Justice* (Cambridge, MA: The Belknap Press of Harvard University Press, 1971).

countries. Also in this respect, inequality is a global phenomenon: high intra-national inequality is a global trend.

Furthermore, the use and invocation of global inequality of course sharply increased in the aftermath of another key concept that made a spectacular entry into the social sciences and broader public in the 1990s: globalization.<sup>74</sup> Today, the concept of global inequality has become mainstream. Similarly, inequality has risen to the forefront of public and political debates. It was a guiding concept throughout the international consultations and negotiations that in 2015 led the United Nations to adopt the 2030 Agenda for Development (also known as the Sustainable Development Goals, or SDGs). Indeed, Goal 10 of the SDGs is to reduce inequality.<sup>75</sup> Inequality—both within and among nations—is again back on the international political agenda.

### INEQUALITY RESEARCH TODAY

Having come so far, what can we say characterizes contemporary research on inequality? Contemporary research on inequality is a vibrant research field, encompassing many different academic disciplines, approaches, sub-themes, and research objectives. Inequality is an important theme in economics, sociology, history, anthropology, intellectual history, geography, public health studies, race and gender studies, migration studies, philosophy (especially moral and political philosophy), and more. One branch of inequality studies focuses particularly on the impact of inequality on other specific parts of society (such as the level of crime in a society).<sup>76</sup> Economists have focused on measuring and explaining economic inequality, but suggesting policy proposals has also been part of their research objectives.<sup>77</sup> Perhaps obviously, economists have mainly been preoccupied with economic inequality, that is, inequality of income or wealth. But important contributions have been made by scholars working across scientific disciplines such as the economist and philosopher Amartya Sen, who has contributed to the broader ambition of expanding the notion of inequality

<sup>74</sup> David Held et al., *Global Transformations*.

<sup>75</sup> MacNaughton, Gillian. “Vertical inequalities: are the SDGs and human rights up to the challenges?”, *The International Journal of Human Rights* 21, no. 8 (2017): 1050.

<sup>76</sup> The best example remains Wilkinson & Pickett, *The Spirit Level*.

<sup>77</sup> Atkinson, *Inequality*, Parts Two and Three; Piketty, *Capital*, Part Four; Walter Scheidel, *The Great Leveler: Violence and the History of Inequality from the Stone Age to the Twenty-First Century* (Princeton & Oxford: Princeton U.P., 2017), Part 6; Stiglitz, *The Price*, Chapter 10.

so that it encompasses more than just economic inequality.<sup>78</sup> Other strands of economics have explored racial discrimination, employing a much-discussed neoclassical individualist framework to do so.<sup>79</sup>

By contrast, sociological research on inequality has long encompassed inequality in other dimensions than the economic, such as inequalities in relation to social class, discrimination, education, and citizenship.<sup>80</sup> An important contribution of a more normative kind was the much-referenced exchange between Nancy Fraser and Axel Honneth on choosing between struggles for recognition and redistribution.<sup>81</sup> That discussion paired two kinds of inequality (economic inequality and status inequality) with two kinds of struggles (for redistribution and recognition). Another key term in sociological approaches to inequality is that of “intersectionality,” originally developed in critical race theory in law, meaning that some kinds of inequalities tend to cut across (impact) others, such as gender inequality or racial inequality.<sup>82</sup> For example, being African American or being a woman often intersects with many other aspects of inequality (see also the chapter by Kitch in this volume).

To sum up, inequality research today spans a dynamic field, encompassing many disciplines, approaches, subthemes, and research agendas. As many of these above examples demonstrate, the more recent concern with global inequality has certainly not been at the expense of continued research on national inequalities. Equally true, contemporary research on *global* inequality is also a vibrant field that shares many—if not all—of the

<sup>78</sup> Amartya Sen, *Inequality Reexamined* (Oxford: Clarendon Press, 1992).

<sup>79</sup> Gary S. Becker, *The Economics of Discrimination* (Chicago: The University of Chicago Press, 1971).

<sup>80</sup> In a vast sociological literature and theorization on inequality, here are only a few references to the seminal work by Pierre Bourdieu: “Cultural reproduction and social reproduction,” in Jerome Karabel & A.H. Halsey (eds.), *Power and Ideology in Education* (Oxford University Press, New York, 1977); Pierre Bourdieu, *The Logic of Practice* (Cambridge: Polity Press, 1990); Pierre Bourdieu, *Sociology in Question* (London: Sage, 1993); Pierre Bourdieu, *Practical Reason: On the Theory of Action* (Cambridge: Polity Press, 1998); Pierre Bourdieu & Loïc Wacquant, *An Invitation to Reflexive Sociology* (Chicago: University of Chicago Press, 1992); Pierre Bourdieu et al., *The Weight of the World: Social Suffering in Contemporary Society* (Stanford: Stanford University Press, 2000).

<sup>81</sup> Fraser & Honneth, *Redistribution or Recognition?*

<sup>82</sup> Walby, *Globalization and Inequalities*. For an intellectual history, see Ange-Marie Hancock, *Intersectionality: An Intellectual History* (Oxford: Oxford University Press, 2016). A seminal article is Kimberlé Crenshaw, “Demarginalizing the Intersection of Race and Sex: A Black Feminist Critique of Antidiscrimination Doctrine, Feminist Theory and Antiracist Politics,” *University of Chicago Legal Forum*, Article 8, (1989).

abovementioned characteristics for inequality research more broadly. What follows next, then, is a more detailed account of how this volume contributes to existing research on global inequality. More specifically, it does so by adopting approaches that are qualitative, actor-based, multidimensional, political, and historical, and by investigating new and important themes.

## NEW APPROACHES TO GLOBAL INEQUALITY RESEARCH

There is a need for new approaches to expand contemporary research on global inequalities. This volume supplements the quantitative research literature with new *qualitative* case studies. Economists have mainly studied global inequalities using quantitative methods. By contrast, many studies from other branches of the social sciences and the humanities have often used qualitative methods, as when anthropologists have focused on intersections between the global and the local.<sup>83</sup> For example, the anthropologist June Nash has studied how the historic disadvantages of indigenous people in Chiapas, Mexico, were deepened by neoliberal economic policies in the 1980s.<sup>84</sup> Similarly, this book focuses mainly on qualitative studies of global inequalities. It does so mostly by assessing important actors, ranging from international organizations to economists to human rights activists, and from philosophers to statisticians to tea farmers.

Indeed, where economists have searched for structural explanations for global inequalities, this book supplements this research perspective by incorporating more *actor-based* studies. Economists have focused on structures and structural explanations for economic inequalities, such as Thomas Piketty's famous  $r > g$  "law of capitalism."<sup>85</sup> Historians and others have also provided structural explanations. But they have also looked into the roles of specific actors, of concepts, political ideologies, and culture. A key purpose of this volume is to address these aspects and to include an actor-centred view on how particular historical agents have acted on global inequalities. Examples from this volume include work on international organizations such as the UN (see chapters by Christiansen, Jensen and

<sup>83</sup> McGill, *Global Inequality*, 24f, 38.

<sup>84</sup> June Nash, *Mayan Visions: The Quest for Autonomy in an Age of Globalization* (London: Routledge, 2001).

<sup>85</sup> Where "r" is the annual rate of return on capital, and "g" is the annual growth rate of output. Piketty, *Capital*, 571–573.

van Trigt), international movements such as Occupy Wall Street or the Global Justice Movement (see the chapter by Ramos Pinto) and the fair trade movement (see the chapter by van Dam). Other examples include the claiming of human rights for all people and the claiming of rights for particular groups such as persons with disabilities (see the chapters by Dehm and van Trigt).

Another key thought behind this book follows an important insight into research on global inequalities, in that it shares a *multidimensional* approach to global inequalities. Sociologists have pointed to the need for a multidisciplinary approach to global inequalities.<sup>86</sup> Economic inequality can be separated out for analytical purposes, but it is very likely to intersect with other kinds of inequality and social and cultural factors. As Robert J. Holton notes, “inequality is generated within society, not simply within the economy.”<sup>87</sup> Indeed, two main findings inform the recent sociology of global inequality, namely the multidimensionality of inequality and the multicausality of inequality.<sup>88</sup> Going beyond class and methodological nationalism, sociologists have pointed out how inequality cuts across a number of additional spheres. As Sylvia Walby points out, “complex inequalities” include “gender, class, ethnicity, race, religion, nation, linguistic community, able-bodiedness, sexual orientation, and age.”<sup>89</sup> They may cut across the spheres of the economic, the political, the social, civil society and violence in society.<sup>90</sup> The concept of multidimensionality is linked to the concept of intersectionality mentioned in the above, where inequality of one kind affects another, often in “reinforcing and overlapping ways,” as, for example, gender inequality *is* economic, political, and social inequality (see the chapter by Kitch in this volume).<sup>91</sup> Furthermore, in Walby’s view there is often multicausality at play in shaping inequalities of various kinds. In her view, it is unsound to search for one causal factor, be it capitalism or globalization, as the one fundamental cause of inequality. While multicausality is perhaps not particularly surprising, given that economists acknowledge complexity but still try to find “weighted explanations,” these findings have had important repercussions for research on global inequalities and some of the most salient themes.

<sup>86</sup> Holton, *Global Inequalities*, 3f.

<sup>87</sup> Holton, *Global Inequalities*, 9.

<sup>88</sup> Holton, *Global Inequalities*; Walby, *Globalization and Inequalities*.

<sup>89</sup> Walby, *Globalization and Inequalities*, 60.

<sup>90</sup> Walby, *Globalization and Inequalities*, 60.

<sup>91</sup> McGill, *Global Inequality*, 41.



The turn towards more historical and qualitatively oriented studies, then, also means supplementing the search for one overarching explanatory variable with other causal factors. In the epistemology of the current research literature, there is a continuum ranging from mono-causality and a high degree of theoretical generalization at one end of the spectrum, moving towards local understandings, singularity, and uniqueness at the other end. As the example with Piketty's famous formula illustrates, there is some evidence that suggests that economists have leaned towards the natural science ideal of a nomothetic epistemology (striving towards finding the singular most important causal factor), even if Piketty himself called for a more historical approach which incorporated other methods and sources than those of quantitative economics.<sup>92</sup> With some strands of economics at one end of this spectrum and some strands of anthropology at the other, the sociology of global inequality—or often in this literature: global inequalities—occupies a space in the middle.<sup>93</sup> In this book, we may not have identified new singular explanatory variables, but we have aimed for historical case studies that identify more local explanations and take into consideration other explanatory variables of a more political, cultural, and actor-centred kind.

In a broader sense, the turn towards more historical- and qualitatively oriented studies also means looking at new and different kinds of *empirical sources*. In this book, they most certainly range very broadly: from philosophical treatises to United Nations archives, from fair trade campaigns to “emerging markets” commercials. Besides a comparative historical approach to the trajectories of different countries, Piketty himself suggested incorporating works of literature. His own literary examples in *Capital in the Twenty-First Century*, however, served pedagogical and stylistic purposes rather than adding scientific value to his main arguments. In that respect, they point more to an interesting avenue for future research: writing the histories of how inequality has figured in (world) literature.<sup>94</sup>

This book highlights the *political* aspects of the history of global inequalities. In doing so, it contrasts sharply with the developmentalist

<sup>92</sup> Piketty, *Capital*, 32–33.

<sup>93</sup> McGill, *Global Inequality*, 13.

<sup>94</sup> Among the recent works of fiction grappling with this theme are the following: NoViolet Bulawayo, *We Need New Names* (London: Vintage Books, 2013); Marlon James, *A Brief History of Seven Killings* (London: Oneworld Publications, 2015); Zadie Smith, *Swing Time* (New York: Penguin Press, 2016); Mohsin Hamid, *Exit West* (London: Penguin Books, 2017).

paradigm that we find in some parts of the literature on global inequality in economics. Where many new histories of global inequality point to its deeper political origins, the developmentalist framework tends to depoliticize inequality. One comparison will illustrate this. The Nobel Prize-winning economist Angus Deaton in his *The Great Escape* mainly finds divergence not convergence between rich and poor countries. His explanation is primarily institutional. Deaton writes:

as Robert Solow showed in one of the most famous papers in all of economics, average living standards should draw closer over time. Why this has not happened is a central question in economics. Perhaps the best answer is that poor countries lack the *institutions*—government capacity, a functioning legal and tax system, security of property rights, and traditions of trust—that are a necessary background for growth to take place.<sup>95</sup>

Deaton then couples his institutional explanation together with a critique of foreign aid.<sup>96</sup> By pointing to the role of institutions and of institutional choices within poor countries themselves, Deaton mainly operates within a developmental paradigm. Indeed, ever since the Enlightenment era, and especially after World War II, inequality between rich and poor nations was often conceptualized in terms of “development” and of differential “stages” of progress.<sup>97</sup> Within this “developmental paradigm,” the level of wealth or poverty in a country is mainly a function of its own policies. These determine whether country A or B can “climb the ladder.”

But where some historians of global inequality have operated mainly within the developmental paradigm, assuming the “singularity” of individual nations and the individual choices they can make, others have instead stressed the interconnectedness of richness and poverty. They

<sup>95</sup> Angus Deaton, *The Great Escape: Health, Wealth, and the Origins of Inequality* (Princeton, NJ: Princeton U.P., 2013), 234.

<sup>96</sup> For other critiques of development aid, see William Easterly, *The White Man's Burden: Why the West's efforts to aid the rest have done so much ill and so little good* (Oxford: Oxford U.P., 2006); Dambisa Moyo, *Dead Aid: Why Aid Is Not Working and How There Is a Better Way for Africa* (New York: Farrar, Straus & Giroux, 2009).

<sup>97</sup> Philipp H. Lepenies, *Art, Politics, and Development: How Linear Perspective Shaped Policies in the Western World* (Philadelphia: Temple University Press, 2014); Philipp H. Lepenies, “An Inquiry into the Roots of the Modern Concept of Development,” *Contributions to the History of Concepts* 4, no. 2 (2008): 202–225; Stuurman, *The Invention of Humanity*, 259–260; Siep Stuurman, “Beyond ‘Modern Equality.’ Can We Write a World History of Cross-Cultural Equality?” *Intellectual History Review* 16, no. 1 (2010): 55–70.

argue, instead, that there is an intrinsic link between some countries being poor and other countries being rich. They stress that global inequality is mainly a result of unequal power structures embedded into the modern international system of nation states with capitalist economies. And they point to the deep legacies of colonialism and to the historical ability of strong states to set up trade rules, tariffs, and so on favourable to themselves, while preaching “free trade” to others. As Simon Reid-Henry points out, “The modern era of globalisation was inaugurated on distinctly uneven terms.”<sup>98</sup> From the perspectives of these histories of global inequality, the root causes of global inequality are political rather than merely economic, geographical, or a function of institutional design.<sup>99</sup> In order to explain global inequality, they have pointed to the political history of colonialism and imperialism up until World War II, and to various key events in the post-war era: from the rise of the Global South as a political project and its lack of success, to the economic warfare against the South in the 1970s, to the changing global geography of production since the 1970s.<sup>100</sup> These political histories yield a very different—and much needed—perspective on global inequality than the developmentalist framework.

This book contributes to current research by investigating *themes* that have received relatively little attention in the literature so far. Existing research on inequality has looked at inequality in relation to different themes, an obvious example being the relationship between capitalism and inequality. Does capitalism lead to more inequality? While plenty of research shows that there is indeed a deep relationship between the two, others have pointed to the varieties of capitalism one finds in different countries and regions.<sup>101</sup> As Göran Therborn notes, capitalism can be “taught how to behave.”<sup>102</sup> Similarly, the relationship between inequality

<sup>98</sup> Simon Reid-Henry, *The Political Origins of Inequality* (Chicago, IL: Chicago U.P., 2015), 16.

<sup>99</sup> Reid-Henry, *The Political Origins*; Jason Hickel, *The Divide: A Brief Guide to Global Inequality and its Solutions* (London: William Heinemann, 2017).

<sup>100</sup> Prashad, *The Poorer Nations*.

<sup>101</sup> In a vast literature on varieties of capitalism and welfare state regimes, see, for example, Walby, *Globalization and Inequalities*, 132–152; Peter A. Hall & David Soskice (eds.), *Varieties of Capitalism: The Institutional Foundations of Comparative Advantage* (Oxford: O.U.P., 2001); Gregory Jackson & Richard Deeg, “Comparing Capitalisms: Understanding Institutional Diversity and its Implications for International Business,” *Journal of Business Studies* 39 (2008): 540–561; Gøsta Esping-Andersen, *The Three Worlds of Welfare Capitalism* (Cambridge: Polity Press, 1990).

<sup>102</sup> Therborn, *Killing Fields*, 171.

and globalization also defies simplistic narratives. Some scholars have suggested disentangling different kinds of processes typically associated with globalization, leading to new, nuanced, and fascinating insights into the effects of, for example, trade or direct foreign investment on global inequality.<sup>103</sup> Along similar lines, it is misleading to equate globalization with neoliberalism, not least because globalization also involves the rise of new forms of global civil society organizations and global governance that are concerned with social democracy and environmentalism.<sup>104</sup>

The history of statistics, economics, international organizations, and of legitimization are important themes to explore further in the context of global inequalities. The history of statistics on inequality and the history of economics are important fields of inquiry (see Cook, Lepenies, and Pinto in this volume). Similarly, the relationship between the UN and global inequalities deserves closer attention (see the chapters by Christiansen, Jensen and van Trigt in this volume). The United Nations as a crossroads of global politics and diplomacy simply operates with a different temporality or chronology when it comes to how it has addressed global inequalities since 1945. It is a rich source for debate, analysis, and contestation over the nature of these inequalities and it challenges chronologies based on domestic political developments, public debates, and academic research. The United Nations had had a distinct renewed engagement with the problem of global inequality for several years before the financial crisis of 2008 sparked a worldwide emphasis on the question.<sup>105</sup>

Only to a limited extent has historical research on inequality examined the relationships between inequality and legitimization.<sup>106</sup> How are modern inequalities justified? Historically and today, rising levels of various kinds of inequality have often been accompanied by justifications of inequality, such as trickle-down economics, marginal productivity theory, “scientific” racism, and so on.<sup>107</sup> The Western world has witnessed a remarkable change towards an increased justification of economic inequality after

<sup>103</sup> Holton, *Global Inequalities*, 120–135.

<sup>104</sup> Walby, *Globalization and Inequalities*, 154.

<sup>105</sup> See, for example, United Nations, *The Inequality Predicament: Report on the World Social Situation* (New York, 2005).

<sup>106</sup> Rosanvallon, *Society of Equals*, 87–111.

<sup>107</sup> John Amis, Kamal A. Munir & Johanna Mair, “Institutions and Economic Inequality,” in *The SAGE Handbook of Organizational Institutionalism*, 2nd ed., ed. R. Greenwood, C. Oliver, T. Lawrence & R.E. Meyer (London: SAGE Publications Ltd, 2017), 705–736; Wisman & Smith, *Legitimizing Inequality*.

the 1970s. If gender and racial inequality were increasingly delegitimized in post-war languages on inequality, which vocabularies—besides the perhaps obvious neoliberal ones—have been used to legitimize high levels of economic inequality? Critiques of rising inequality have been met with new defences of inequality by leading economists such as Gregory Mankiw.<sup>108</sup> Where recent research has shown that economic inequality is extremely resilient, perhaps one additional reason for this resilience is its strong ideological support.<sup>109</sup> How, for example, are recent increases in inequality levels in countries such as China, India, or Ghana legitimized? Do they form part of a global pattern in which countries are becoming more accepting of high levels of inequality? Contributions to this book, such as those by Christiansen, Thompson, and Ravinder Kaur, highlight the importance of how words, concepts, and ideas structure and legitimize inequalities.

Above all, of course, this book offers a *historical* approach to global inequalities. Recently, mapping and explaining the longer history of world economic development and inequality has been a key endeavour for best-selling economists such as Thomas Piketty and Angus Maddison and historian Walter Scheidel.<sup>110</sup> Geographers, anthropologists, and others have also taken on a historical approach to their mappings of global inequality.<sup>111</sup> They have done so with often very different results, readings, and assessments of the history of global inequality.

The value of a historical perspective on inequalities, however, still merits more attention. The historical approach has the merit of comparing and judging developments over a long time span, thereby contributing with a unique sense of orientation in the context of present-day arrangements. It can also point to the existence of important path dependencies that also defy simplistic accounts of inequalities, such as global capital accumulation. Research has demonstrated the deep histories and long-term impacts of colonialism, imperialism, racism, and slavery on present-day inequalities

<sup>108</sup> Gregory Mankiw, “Defending the One Percent,” *Journal of Economic Perspectives* 27, no. 3 (2013): 21–34; Finis Welch, “In Defense of Inequality,” *The American Economic Review*, 89, 2 (1999): 1–17.

<sup>109</sup> Piketty, *Capital*; Scheidel, *The Great Leveler*.

<sup>110</sup> Piketty, *Capital*, 59–71, 430–467; Angus Maddison, *Contours of the World Economy, 1-2030 AD: Essays in Macro-Economic History* (Oxford: Oxford U.P., 2007); Scheidel, *The Great Leveler*.

<sup>111</sup> Reid-Henry, *The Political Origins*; Hickel, *The Divide*; Prashad, *The Poorer Nations*.

(see the chapter by Sacteur in this volume).<sup>112</sup> For example, studies have documented the long-term impacts of slavery in the mid-nineteenth-century United States on white-black inequality in the United States today, as well as the impact of the slave trade on African countries today.<sup>113</sup> Another set of examples are the deep histories of various kinds of original accumulation, such as the long-term effects of enclosures, land grabbing and the dispossession, displacement and destruction of indigenous peoples. A further set of examples include long-lasting effects of Cold War politics on colonial and postcolonial countries. Against the simplistic view that poor countries simply need to tighten up their institutional design (cf. the critique of the developmentalist paradigm in the above), there is a need for an acknowledgment of long-term effects on governance, corruption levels, and so on derivative from meddling with the political system or outright support of *coup d'états* in other countries. Methodological nationalism fails to take into consideration the dynamics of international politics that have shaped the trajectories of nation states.

This is not to say that a global historical perspective on inequality is not without its pitfalls. The analytical value of the very terms “global” and “globalization” has been of much debate among historians. Is the whole world or globe the best analytical frame to address some of the many inequalities that transcend national boundaries? Or, to paraphrase Frederick Cooper: how global should the histories of global inequalities be?<sup>114</sup> While a global perspective on inequality can bring in many new voices and enable the study of inequality patterns that go beyond nation states, and so on, there are also limitations to viewing inequalities through a global lens. It can become too morally loaded, implying that it is, *a priori*, better than other, more limited investigations. A global lens may overemphasize relations and connections that are there, but are weaker than other, more specific national, transnational, or regional connections. The concept of the global may downplay other important international, transnational, or regional frameworks, such as the still vast inequalities between North and South. The global or planetary brings new insights to life but it should not be at

<sup>112</sup> Holton, *Global Inequalities* 57, 65–68; McGill, *Global Inequality*, 7–9, 20.

<sup>113</sup> Heather O'Connell, “The Impact of Slavery on Racial Inequality in Poverty in the Contemporary US South”, *Social Forces* 90, no. 3 (2012): 713–734; Nathan Nunn, “The Long-Term Effect of Africa's Slave Trades,” *Quarterly Journal of Economics* 123, no. 1 (2018): 136–176.

<sup>114</sup> Frederick Cooper, “What is the Concept of Globalization Good for? An African Historian's Perspective,” *African Affairs* 100, no. 399 (2001): 189–213.

the expense of other analytical frames which, at times, are closer to the historical realities of inequalities.

Bearing these reservations in mind, there are indeed a number of themes and analytical perspectives unique to a historical approach to global inequalities.<sup>115</sup> These include making international, transnational, and global comparisons, examining inequalities across national borders with a comparative perspective. They include studying international, transnational, and global entangled histories, that is, where inequalities are directly linked to one another. They include studying the use of particular concepts in addressing inequalities, and how specific actors operated with these concepts. They include studying past constructions of asymmetrical relationships between different cultures or groups, such as in studies of gender, race, and ethnicity. They include studying how inequalities were shaped, discussed, and conceptualized across a broad range of geographical areas, dimensions, and various kinds of literature and materials in order to unpack the many different dimensions and faces of global inequalities which cannot be covered by statistics and numbers.

As this volume demonstrates, there is ample space for more historical research on global inequalities. This is also the case for what concerns some important themes which this volume has not addressed—but where promising research is being made—such as the relationships between inequalities and taxation, tax havens, climate change, oligarchy, and elites.<sup>116</sup> Historical research on global inequality is not at the beginning. Neither is it at anywhere near an end.

Current levels of inequality are at a grotesque level. The new “Gilded Age” of global inequality needs new histories that can help us better understand how we got here—and where we can go from here.

<sup>115</sup> Andersen & Thorup, “Indledning.”

<sup>116</sup> On inequality and climate change, see, for example, Hickel, *The Divide*; on tax evasion and tax havens, see, for example, Brooke Harrington, *Capital Without Borders: Wealth Managers and the One Percent* (Cambridge, MA: Harvard U.P., 2016) or, historically, Vanessa Ogle, “Archipelago Capitalism: Tax Havens, Offshore Money, and the State, 1950s–1970s,” *The American Historical Review* 122, no. 5, 1 (2017): 1431–1458; on oligarchy, see, for example, Jeffrey A. Winters, *Oligarchy* (Cambridge, Cambridge U.P., 2011).

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