

Concept Creep

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Debates, examinations, and concerns over inequality—whether social, financial, political, or otherwise—have engaged a range of thinkers and actors (from state bureaucrats and government officials to moral philosophers and political economists) to varying degrees since at least early modernity. From the early to mid-nineteenth century, as industrial modernity and the depredations of Euro-American capital remade labor and social relations in metropolitan and imperial worlds, leading to the immiseration of thousands and the transformation of the global countryside, disparities in incomes and distribution of resources among population groups widened markedly. Divergences in rates of economic growth around the world in the postwar decades, intensified by inflationary crises in the 1970s and the logics of neoliberal privatization and developmentalist models of ‘structural adjustment,’ caused further and increasingly widespread inequality not only between but also within countries. Since the Great Financial Crisis (GFC, also often referred to as the Great Recession) of 2008-09 that ushered in stringent austerity measures in many countries, social and economic inequality has ballooned around the world, with wealth accumulation concentrated in the hands of highly privileged elites as the gulf between financiers and company leaders, and their employees and workers, has widened dramatically. Precariousness under capitalism has come to define many working lives, while social safety nets have either become smaller or disappeared entirely. In the wake of these dislocations and growing economic hardship for many, mobilizations, grassroots organizing, and mass protests (from Occupy Wall Street to anti-globalization movements of various kinds) have brought renewed focus on inequality and the social, economic, and political conditions under which it develops in fostering disparities in and across societies.

In response to these pressures, states, institutional actors, and non-governmental entities have sought in a variety of ways to address pervasive inequality among their populations. Economists, social commentators, and others have devised models and explanatory frameworks to understand its manifestations and valences in a world that has become ever-more unequal over the past forty years. Understanding the roots of this deepening inequality has equally preoccupied scholars with an interest in providing analytical

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depth to this social and economic phenomenon which has (re)shaped human relations and lives in profound and profoundly different ways. The complexities of inequality, its persistence, and the socio-economic marginalization it produces both among and for millions of people necessitates perspectives from a range of specializations and fields of study. It thus comes as no surprise that the present volume edited by Francisco Bethencourt, *Inequality in the Portuguese-Speaking World: Global and Historical Perspectives*, adopts a markedly transdisciplinary examination of inequality throughout the Lusophone world. Although this world is heavily circumscribed, with the majority of the contributions focusing on Portugal and Brazil, three of the essays address the question of inequality in the contexts of Angola and Mozambique while one chapter tackles the subject of welfare colonialism from the perspective of the imperial state and its policy initiatives; another surveys various dimensions of social inequality across Portugal's widespread empire. However, other Portuguese-speaking countries, such as Cabo Verde, Guinea-Bissau, and São Tomé e Príncipe, do not appear in this collection, which I should note does not make a claim to comprehensiveness. Given that these countries have exceedingly high rates of social and political inequality, though, the inclusion of at least one of these cases would have enhanced the breadth of the book's analysis.

Nonetheless, in ranging broadly across time and space, the essays provide insights into the range of factors, policies, and myriad political decision-making processes that created the conditions in and through which inequality developed and, in many instances, expanded. At the same time, the essays delve into the responses by states and their institutional mechanisms—as well as those of non-state entities—to ameliorate inequality and arrest its most pernicious effects. In the case of Portugal, for instance, this meant reversing the deleterious effects of the policies and politics of austerity that were introduced to address the GFC and which, in undoing social welfare programs that had been in place since the country's 1974 revolution, increased income inequality and raised rates of social exclusion between 2008 and 2015, even if these remained relatively low in comparison to most European states. Ultimately, after a leftist coalition assumed power, austerity “was contained and eventually reversed by a shared commitment to wider, progressive coalition-building among disparate social movements and between these and centre-left and radical-left political parties” (Fernandes: 81-82). The trajectory of Portugal's experiences with inequality is given further context in an examination of the Estado Novo and its authoritarian regime, which ruled the country between the 1930s and early 1970s. Over this period, the particular nature of the state's corporatist welfare policies and fiscal directives, which favored its supporters,

created highly unequal conditions for its citizens amid increases in income inequality and levels of material deprivation and poverty.

Yet, while conceptually and analytically, inequality can be a useful lens through which to read and understand the past (Francisco Bethencourt, for instance, in his broad treatment of inequality in the Portuguese Empire, regards social inequality as the driver of the imperial system “from beginning to end”) and apprehend the social, economic, and political dynamics of today’s societies, there is also the risk that its capaciousness assumes an all-encompassing explanatory primacy that either flattens the processes and patterns it seeks to illuminate or is over-burdened, especially when accounting for histories that are better explained through other frameworks. Inequality means different things to different analysts and scholars. For economists and political scientists, the “best known and most widely used inequality indicator” (Rodrigues: 59) is the so-called “Gini coefficient”—used in a number of the volume’s contributions—which purports to measure the degree of inequality in relation to the distribution of income among individuals or households within a given economy. It has assumed an authoritative place among the metrics used by the World Bank and other institutions in determining the levels of wealth accumulation and poverty—and the differences between them—in countries around the world. This statistical measure is not without its problems, however, none more so than how income is defined because of the disparate ways in which countries that provide data to the World Bank actually measure it—some do so on a per household basis while others measure income per individual; still others measure wage earnings but not financial holdings. This is to say nothing of the exclusion of earnings from the informal sector that in low-income (and even some middle-income) countries can constitute a significant portion of the economy. Clearly, the Gini coefficient is a deeply flawed metric and should be used, if at all, in a highly qualified manner.

For other scholars in this collection, however, inequality often assumes a nebulousness that seemingly makes it an applicable analytic for myriad contexts. It is either loosely employed in authors’ analyses or the subject matter described is not clearly related to inequality. Moreover, how does thinking with and through inequality alter understandings of, or challenge perspectives about, histories whose valences can be examined through conceptual frameworks such as power, domination, or violence? For example, in the short essay by Laurent Vidal, while asserting that “inequalities” are “socially determined social phenomena,” the author develops their arguments about the syncopated rhythms of “slow men” in nineteenth-century Rio de Janeiro (individuals such as longshoremen and construction workers who, by their actions during the period of Rio’s entry into “the era of

modernity,” sought to resist the “imposition of a new rhythm” dictated by the pace of “modern, industrial society” in ways that reflect “a logic of resistance” characteristic of strategies used by marginalized societies more broadly both to express their opposition to exploitative forms of labor mobilization and to assert an element of control over their lives (124-125). This resistance to new structures and imperatives of industrialized work, expressed also through music and dance, seems to bear little on inequality and rather is an exploration of the ways in which, and the spaces across which, the weak and poor enacted and performed a politics of resistance to exclusion and marginalization. The piece is suggestive but would have been just as effective without the concept of inequality.

This is equally the case with Hilary Owen’s fine essay that seeks to “explore how, and to what end” particular constructions of “woman [sic] as social ‘crossing points’ or figures of mediation between times and places of transition” (41) find cinematic expression through the work of two Mozambican directors, Licínio de Azevedo and João Luís Sol de Carvalho. Their films elucidate processes of “gender struggle” (144), “abuses of sexual power” (147), and “expose hidden and unacknowledged forms of sexual discrimination” (142) reflective of abuse, exploitation, and gender violence. As in the essay by Vidal, this contribution by Owen also makes mention of inequality but quickly moves onto its primary analysis, an incisive deconstruction of the gender dynamics at play during key moments of Mozambique’s postcolonial history. Conceptually and analytically, inequality does not serve the purpose of the argument, and its addition seems therefore somewhat gratuitous. Owen’s otherwise excellent examination of female subjectivity and experience as portrayed in the films of these directors would have been as compelling without attempting to tether it to the concept of inequality. What is gained intellectually, then, by utilizing inequality as an analytical framework?

There is no clear answer to this question. The range of complex and multifaceted processes analyzed in *Inequality in the Portuguese-Speaking World* are not reducible to, or contained by, inequality. Other conceptual frames and analytical optics offered by the authors in the collection—as found, for instance, in the section “The Colonial Period”—serve to capture historical realities and dynamics convincingly. Filipa Lowndes and Inês Vieira Gomes, for example, in their analysis of the 1919 trial of Tenente José Veloso de Castro in Luanda illuminate the politics of racialized rule, colonial violence, the dynamics of social hierarchies, white privilege, and class mobility (through the structures of the military and its influence that in this period were expressed in the “militarization of the public functions of the [Angolan] colony”) that allowed men from “different social backgrounds and education”

to establish themselves in the “more flexible environments” of nascent colonial governance (219). Although the charges against Veloso de Castro included the trafficking of African women between Angola and the Belgian Congo, and committing sexual violence and abuse, resulting in a sentence of imprisonment for a mere three days, he was able to leave the colony in 1920 (chastened but not defeated) and assume “an active involvement in the creation of a discourse on Portuguese colonialism” in metropolitan Portugal (232). White colonial subjectivity, anchored in the authority of the military and in the “predatory violence of photography” (220)—as practiced by Veloso de Castro who took over 2,000 photographs during military expeditions and included them in reports expressing the assertion of Portuguese power over the region and its inhabitants—afforded the Tenente an imperial legitimacy in Lisbon as producer of colonial knowledge and public supporter of colonial initiatives. This is another otherwise excellent essay but, once again, the question as to whether its analysis could have been as successfully accomplished without utilizing inequality remains. The analytical work of the other concepts on which the essay draws would suggest as much.

There is a great deal to recommend in *Inequality in the Portuguese-Speaking World*, and I encourage readers to consult its pages for the multidisciplinary perspectives that they offer on the Lusophone world. My aim here has been to encourage greater justification for the use of a concept such as inequality that, in being deployed across a range of temporal and spatial scales, flattens processes that other analytical frameworks used in the volume—such as power, violence, and race—elucidate in sharper and more precise terms.

References

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Bionote/ Nota Biográfica

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