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PRESENTATION/APRESENTAÇÃO

Stratification in the 21 century: opportunities and trajectories

Estratificação no século 21: oportunidades e trajetórias

Estratificación en el siglo 21: oportunidades y trayectorias

Celi Scalón¹

orcid.org/0000-0002-9477-3156

celiscalon@gmail.com

Fernando Tavares

Júnior²

orcid.org/0000-0001-7892-4017

ftavares@caed.ufjf.br

Sin Yi Cheung³

orcid.org/0000-0002-9913-1451

cheungsy@cardiff.ac.uk

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Abstract: The global Covid-19 pandemic had seen inequalities much exacerbated and disparities between and within nations widened. The socio-economic crisis experienced in Brazil is no exception. The long-term impacts of the pandemic on our socio-economic and political lives and how they shape the production and reproduction of inequalities will continue to dominate contemporary sociological debates. We propose a set of original papers that focus not only on the measurement of social inequalities, but seek to articulate the complex social processes based on new empirical evidence on wealth distribution, well-being and life chances in the 21st century. Despite being a late-industrialized country, the general trends observed in Brazil in inequalities can shed light on similar developments in other societies, and this Special Issue aims to provide an in-depth analysis of the persistent and deepening inequalities worldwide.

Keywords: Stratification. Trajectories. Social inequalities.

Resumo: Durante a crise decorrente da pandemia, as desigualdades se exacerbaram e as disparidades entre nações, internas e externas, aumentaram. A crise socioeconômica vivida no Brasil não é exceção. Os impactos de longo prazo, socioeconômicos e políticos, e como eles moldam a produção e a reprodução das desigualdades continuarão a dominar os debates sociológicos contemporâneos. Propomos um conjunto de artigos originais que se concentram não apenas na mensuração das desigualdades sociais, mas buscam articular os complexos processos sociais a partir de novas evidências empíricas sobre distribuição de riqueza, bem-estar e chances de vida no século 21. Apesar de ser um país de industrialização tardia, as tendências gerais observadas no Brasil podem lançar luzes sobre processos similares em outras sociedades e este dossiê visa fornecer uma análise aprofundada das desigualdades persistentes e profundas em diferentes contextos.

Palavras-chave: Estratificação. Trajetórias. Desigualdades sociais.

Resumén: Durante la crisis de Covid, las desigualdades se han exacerbado y las disparidades entre y dentro de las naciones se reflejan. La crisis socioeconómica que vive Brasil no es una excepción. Los impactos a largo plazo de la pandemia en nuestras vidas socioeconómicas y políticas y cómo dan forma a la producción y reproducción de las desigualdades seguirán dominando los debates sociológicos contemporáneos. Proponemos un conjunto de textos originales que se enfocan no solo en la medición de las desigualdades sociales, sino que buscan articular los complejos procesos sociales con base en nueva evidencia empírica sobre la distribución de la riqueza, el bienestar y las oportunidades de vida en el siglo 21. A pesar de ser un país de industrialización tardía, las tendencias generales observadas en Brasil pueden lanzar luces sobre procesos similares en otras sociedades, y este Dossier tiene como objetivo proporcionar un análisis en profundidad de las desigualdades persistentes y cada vez más profundas en todo el mundo.

Palabras clave: Estratificación. Trayectorias. Desigualdades sociales.



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¹ Universidade Federal do Rio de Janeiro (UFRJ); Universidade Estadual do Rio de Janeiro (UERJ), Rio de Janeiro, RJ, Brasil.

² Universidade Federal de Juiz de Fora (UFJF), Juiz de Fora, MG, Brasil.

³ Cardiff University, Cardiff, UK.

It would be impossible to discuss stratification in contemporary societies without addressing the most devastating phenomena humankind had experienced in the 21st century: the global pandemic.⁴ While our Special Issue does not specifically address Covid19 and its consequences, the findings brought together in this collection of articles cannot be read without bringing to our minds how the pandemic had affected or had been affected by the stratification processes. During the Covid crisis, inequalities have been grossly exacerbated and disparities between and within nations sometimes became a matter of life or death.

As Ulrich Beck (1992) contends, economic crises tend to exacerbate social inequalities. The socio-economic crisis experienced in Brazil since the beginning of the Covid-19 pandemic is no exception. After imposing mandatory restrictive measures to mass gathering and the retraction of economic activity, the society as a whole felt the effects of the crisis, but its consequences vary enormously across different social classes. Data from the National Household Sample Survey (Pnad) show that,⁵ since the beginning of the pandemic (Pnad - Covid19), about 7.9 million people were working remotely. However, this vary significantly by the level of education. Among people with higher education, 28.3% were working remotely, while only 0.3% of those with below elementary education could do so. What these data illustrate is how the maintenance of jobs, the ease of remote working and the real condition of "social isolation" are deeply divided and unequal.⁶

The long-term impacts of the pandemic on our socio-economic and political lives and how they shape the production and reproduction of inequalities will no doubt continue to dominate contemporary sociological debates. Before more robust data can be collected, our proposal for this Special Issue, written on Christmas Eve

2019, hopes to advance our understanding of the long-standing structural inequalities in our society. We trust that this collection of papers presented here are important contributions to re-examine the continuities and changes in the stratification processes during the course of this century.

Despite being a classic topic in Sociology, research on the multiple forms of stratification and social dynamics that shape trajectories and opportunities in contemporary societies continues to need updating and strengthening (Pakulski and Waters 1996). We put together a set of original papers that focus not only on the measurement of social inequalities, but seek to articulate the complex social processes based on new empirical evidence on wealth distribution, well-being and life chances in the 21st century.

Despite being a late-industrialized country, the general trends observed in Brazil in inequalities can shed important light on similar development in other societies. Widening wealth inequalities had exposed the decline of labor market regulations where precarious work contracts (Piketty 2014), unemployment and salary cuts prevail. In this regard, Souza (2020) argues that the precariousness of work tends to intensify in the midst of the pandemic. Individuals in informal or precarious occupations are more likely to be exposed to contagions and infectious diseases. When they become sick, it is also harder for them to take isolation measures due to financial hardship and economic pressures. Meanwhile, educational inequalities do their share to contribute to public health crisis as unequal access to reliable information makes it difficult to make informed decision about adopting preventive measures. Incidence of comorbidities is higher (42%) among Brazilians with a lower level of education compared to the general population (33%) (Pires, Carvalho and Xavier 2020).

In times like these, racial inequalities also ten-

⁴ This work was supported by the Brazilian National Council for Scientific and Technological Development (CNPq), Fundação de Amparo à Pesquisa do Estado do Rio de Janeiro (Faperj) and Fundação de Amparo à Pesquisa do Estado de Minas Gerais (Fapemig).

⁵ The interviews were carried out between the 09th and 26th of September 2020 by the Brazilian Institute of Geography and Statistics (IBGE). Accessed 5 Jan. 2021, <https://www.ibge.gov.br/estatisticas/sociais/populacao/17270-pnad-continua.html?edicao=32275&t-conceitos-e-metodos>.

⁶ IBGE. 2020. *O IBGE apoiando o combate a Covid -19*. Accessed 5 Jan. 2021, <https://covid19.ibge.gov.br/pnad-covid>.

ded to deepen as the incidence and number of deaths are racially biased (Goes, Ramos and Ferreira 2020). Historically, racial disparities in Brazil are associated with spatial and geographic segregation. Disadvantaged racial minorities in cities have less access to public resources and services, basic sanitation and health services. The National Household data⁷ show that among the 45.2 million Brazilians were living in inadequate housing in 2019, 31.3 million (69.2%) were black or brown.⁸ There is, therefore, a cleavage of color in the authorities' ability for providing basic sanitary measures during the pandemics. To this end, it is worth noting the study by Demenech et al (2020) linking the Gini Coefficient of Brazil to Covid-19 infection and mortality, who argues that the more unequal the State is, the higher is the number of Covid 19 cases and deaths.

This Special Issue aims to provide an in-depth analysis of the persistent and deepening inequalities; the themes brought into light by Bertoncello, Brunet et al; Plá and Ayos; Piovani; Leão et al; Soares et al; and Ribeiro and Borges are related to spatial distribution of social groups and segregation patterns; labor relations; gender and education in Argentina and Brazil. Together, they form the key dimensions that account for significant levels of inequality in the face of changing social policies and government regimes. Also worth noting is that institutions such as education and the labor market, continue to receive special attention and these original analyzes in our Special Issue will provide new insights to the social pathways that reproduce or avert the course of opportunities. The articles included in this Special Issue collectively present a complex perspective on the dynamics of how individuals and institutional features intersect. Importantly, they document the advances and setbacks of social policies during the first decades of 21st century in Latin America. This is particularly vividly illustrated by Piovani and Plá & Ayos who compare the empirical patterns in Brazil and Argentina.

In the first article, "Classes sociais e consumo: um estudo dos gastos das famílias brasileiras a partir da POF (2017-8)", Bertoncello examined a key dimension of Bourdieusian theory of class: the association between social class and consumption using the Brazilian Household Budget Survey data (2017-2018). The theoretical approach connects practices, dispositions and classes, which leads to understanding consumption as a privileged empirical variable to observe class-based social divisions. The author compared the structure of family expenditures and social positions to investigate the patterns of consumption. This allows the differentiation of social classes and their fractions in terms of distinction. The results show a strong correspondence between the volume of capital in the family and the weight of the so-called "necessary expenses" and "freedom expenses" have in the structure of family expenditures. He concludes that social stratification of consumption in Brazil is structured among the different classes according to the volume and the composition of their capital, and the associated logic that operates in their social space.

"Fratura Geracional no Brasil no início do século 21? Análise das oportunidades de vida da geração jovem no Brasil entre 2012 e 2019", by Brunet, Cardoso and Andrade, follows the same theoretical framework. Their results challenged the popular optimism followed by the improvements in living standard in Brazil in the first decade of 21st century. Serious economic setbacks, particularly in the decade of 2010-2020, had led the country to a social crisis. Their findings showed a marked change in the trends in employment opportunities and their effect on generational trajectories (Chauvel 2008) between 2012 and 2019, even before the outbreak of Covid-19. The authors analyzed the data for 2012 and 2019 using correspondence analysis. The results point to a reduction in middle class occupations in Brazil, which affects predominantly younger generation, as confirmed by the increasing number of

⁷ IBGE. 2020. *Pnad – Pesquisa Nacional por Amostra de Domicílios*. Accessed 10 Jan. 2021, <https://www.ibge.gov.br/estatisticas/sociais/trabalho/9127-pesquisa-nacional-por-amostra-de-domicilios.html?=&t=o-que-e>.

⁸ IBGE. 2019. Instituto Brasileiro de Geografia e Estatística. *Desigualdades sociais por cor ou raça no Brasil*. Accessed 5 Jan. 21, https://biblioteca.ibge.gov.br/visualizacao/livros/liv101681_informativo.pdf

highly educated young people in manual classes. Their evidence revealed both the retraction of opportunities among the middle classes and its consequences for the expansion of generational inequality in terms of employment opportunities.

Plá and Ayos' paper "Social class and income distribution: analysis of household inequality sources in Argentina, 2003-2020" analyzes the relationship between household income sources and household economic welfare over a medium-term period spanning different political-economic cycles in Argentina. Based on microdata from the Permanent Household Survey (EPH for its acronym in Spanish) of the National Institute of Statistics and Census (Indec for its acronym in Spanish), they used the widely known class schema (EGP/Casmin) to investigate the relationship between social class and income sources. Labor income is distinguished from non-labor sources, allowing the differentiation between market and social security (welfare) income. At the household level, they applied decomposition analysis by income sources and social class of the Gini coefficient, an economic inequality index. They found strong dependence of households of all social classes on labor income for their social reproduction. The total income of Argentinean households in 2003, a time of economic, political and social crisis, is strongly correlated with labor source, a correlation that is maintained until 2010. In 2014 and 2018, a slight increase in the correlation between income from welfare sources and total household income is observed within households. They observed that market income is a generator of inequality in all classes. Paradoxically, in all classes the share of labor income in the composition of total income declined since 2018. In other words, under the new orthodox government, the weight of non-labor income increases. The influence of social class on household income remains relatively stable over time and, when it decreases, it is due to a greater extent to discrepancies in market and welfare income sources than to labor income.

"Las desigualdades educativas en Argentina: análisis sincrónico de la situación y trayectoria

escolar de diferentes cohortes de niños y adolescentes", studied the reproduction of cultural capital by examining school trajectories in Argentina. Piovani examined the schooling situation of four cohorts of children and teenagers, whose ages correspond to the elementary and advanced phases of primary and secondary schools. The research was based on the secondary data analysis of Encuesta Nacional sobre la Estructura Social – Enes (National Survey on Social Structure). Their results pointed to patterns similar to those reported by Brunet et al and Bertoncelo for Brazil: social achievements reflect the social origins. However, in recent years, the younger generations have faced more obstacles and challenges in converting their origin's capitals into social achievements. All these phenomena are clearly associated with household socio-economic profiles, living conditions, types of school management and regions of residence. These inequalities operate at different levels and the intra-cohort and inter-cohort disparities are reported in relation to school system coverage, over-age, drop-out, the acquisition of computer skills and foreign languages, as well as academic performance. As a result, entrenched educational inequality remains for the younger generations despite the high level of coverage of the school system. These results can be explained, according to Piovani, by three major dimensions: socioeconomic factors, type of school management and region of residence. Pupil performance improves among those from middle and high socioeconomic backgrounds, and private school attendance leads to better academic results. These privileged conditions thus enable some children to transfer their family capital to better educational outcomes. The author argues that this pattern tends to increase inequalities among the youngest and in turn weaken the weight of credential itself.

Turning to educational inequalities and transition to the labor market, Leão et al's paper investigates "The Changing structure of school to work transition in Brazil" using data from the 1991, 2000 and 2010 Brazilian Censuses. They identified changes in the education-occupation linkage that

were offset by Brazil's rapid educational expansion, distinguishing between changes in rates and changes in the structure of school-to-work linkages. They decomposed the total linkage by educational level to investigate where the linkage strength in Brazil originates from in 1991 and in 2010.⁹ During this period, the relative contribution of each educational level changed considerably. In 1991, 40% of the total linkage strength originated from tertiary education even though only 8% of graduates had obtained a college or higher degree. On the other hand, 15% of workers had a college or higher credential in 2010 and 58% of the total linkage strength originated from tertiary education. However, the overall compositional shift towards higher educational levels did not have substantial effects on occupational allocation. Importantly, the trends for younger and older workers, as well as for workers with different fields of study in the tertiary system, were fundamentally different. The main hypothesis is related to the changes in features of educational expansion in Brazil during that period. Such changes tended to contribute to a weakening of the links between education and occupational systems.

Soares, Covre-Saussai and Sento-Sé article, "Discriminação salarial de trabalhadores/as com deficiência no Brasil: uma análise interseccional por gênero e raça/cor", exposes a crucial issue for inequality studies – differences in capabilities. It makes it quite impossible to believe that equal outcomes are viable when societies have to deal with extreme unequal conditions. Amartya Sen (1992) argues that to eradicate extreme inequalities transformative public policies are required. Focusing on the concept of capability he questions what can be understood as merit when the departing points are so uneven. Soares et al's article investigates wage disparities for disabled workers, considering four types of disability: visual, hearing, motor, and mental. It also explores the intersection of disabilities with other social discriminatory dimensions, such as race/color and gender. Using 2010 census data, the

authors identified evidence of a wage penalty for all the four types of disability examined. The most disadvantaged workers were those with severe visual impairment, followed by physical disabilities and, lastly, mental and hearing disabilities. Alarmingly, the authors found that disability is not the major source of wage discrimination, instead the effect of gender is six times greater than of visual impairment, and almost four times for race/color. When considering the intersection of these inequalities - disability, gender, and race/colour - the authors concluded that black women, with and without disabilities, are those who endure the highest wage discrimination in Brazil.

"Percepções de bem-estar nas favelas da Maré: uma análise das desigualdades e estratificação das subjetividades" is the joint effort of Ribeiro and Borges. Using a representative sample of adults living in the favelas of Rio de Janeiro, the authors examined the subjective well-being (SWB) of the respondents, integrating the study of SWB and urban analysis. Poverty and inequality are different concepts but they are strongly correlated when considering extreme unequal wealth distribution. That is the case of Brazil, a middle-income country with a significant part of its population living in extremely vulnerable conditions. The authors argue that recognizing this relationship is essential in order to promote a fairer society. As sociologists, we are aware that the determinants of stratification are socially justified allowing – or not - the persistence and even deepening of social inequities. If we recognize social experiences and opinions are key elements for the acceptance and justification of wealth and opportunity disparities, we must welcome studies dedicated to examining such core dimensions of inequality. Ribeiro and Borges found that subjective evaluation of well-being varies according to gender, income, health conditions and social network (relational capital), as well as exposure and fear of violence. They concluded that subjective well-being is unequally distributed even among people in similarly vulnerable situations. These

⁹ To better understand the linkages methodology, see Di Prete et al (2017) and Elbers (2021).

different perceptions in turn reinforce patterns of inequality reproduced in the general population.

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Celi Scalon

PhD in Sociology at the Instituto Universitário de Pesquisas do Rio de Janeiro (Iuperj), Brazil. Professor of Sociology, Universidade Federal do Rio de Janeiro (UFRJ) and Universidade Estadual do Rio de Janeiro (UERJ), Rio de Janeiro, Brazil.

Fernando Tavares

PhD in Sociology at the Instituto Universitário de Pesquisas do Rio de Janeiro (Iuperj), Brazil. Professor of Sociology, Universidade Federal de Juiz de Fora (UFJF), Minas Gerais, Brazil.

Sin Yi Cheung

D. Phil. in Sociology at the University of Oxford, UK. Professor of Sociology and co-director of research at the School of Social Sciences, Cardiff University, Cardiff, UK.

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