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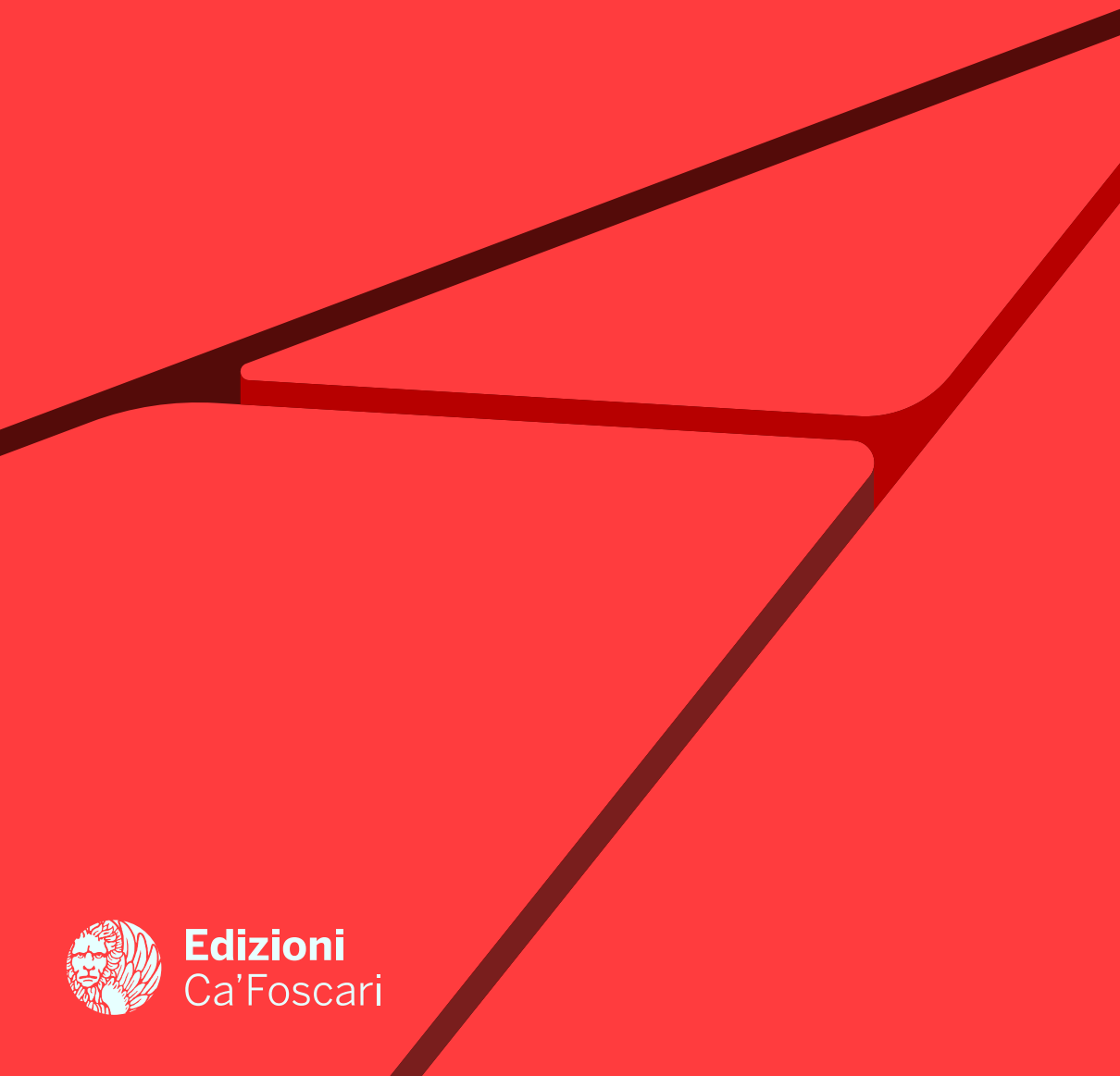

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II – INEQUALITIES IN CONTEMPORARY BRAZIL

MISCELLANY

Inequalities in Brazil

edited by

Ricardo Antunes

adjunct editors

Ricardo Festi, Marco Gonsales, Luci Praun, and Murillo van der Laan

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Inequalities
Vol. 3 – May 2026

Introduction
Inequalities in Brazil, Yesterday and Today

Ricardo Antunes
University of Campinas, Brazil

This third special issue of *Inequalities* is a vivid photograph of inequalities characterizing Brazil, a country that until recently was among the ten largest economies in the world and that, paradoxically, coexists with a high degree of income concentration and high levels of poverty, shaping a profoundly unequal reality.

What does explain this reality? How can we understand the causes and the multiple dimensions of inequality in Brazil?

Its main explanatory elements lie in its historical genesis, which dates back to the formation of the old colonial system at the beginning of the sixteenth century. Making use of the mechanisms of primitive capital accumulation, the colonial system of exploitation established by Portugal in Brazil destroyed the original production systems of Indigenous communities and imposed a brutal process of labor enslavement, carried out through the capture of millions of Afro-descendant men and women who were transferred to the newly occupied Brazil.

Its central objective was to establish in the Colony an agrarian export-oriented economy focused on producing agricultural commodities needed in the European market, such as sugarcane and coffee, as well as introducing mineral extraction aimed at finding precious metals like gold and silver, which were highly coveted by emerging mercantile capitalism. This process was defined by the

Brazilian historian Caio Prado Jr. as the "meaning of colonization" (*sentido da colonização*) (Prado Jr. 1967): an agrarian export economy, based on the enslavement of labor, whose purpose was to serve the interests of the emerging European mercantile bourgeoisie, which accumulated wealth through the trafficking of people.

In order to provide elements that allow for a better understanding of the process of genesis of inequalities in Brazil, this issue presents four important articles:

The article "Struggles, Conflicts, and Inequalities among Indigenous Peoples in Brazil", by Marco Tobón, helps us to understand the resistance struggles of Indigenous communities in Brazil, which were decimated by the process of colonial exploitation.

The article "Capitalism, Racism, and Inequalities in Brazil", by Deivison Faustino, discusses the profound social consequences of the enslavement of labor in Colonial Brazil – a wound that originates, shapes, and intensifies the racial inequalities that so deeply characterize Brazilian society.

The article "Racial/Colonial Capitalism in the Epistemology of Social Security Law: Inequality Patterns in Contributory Benefits in Brazil", by Rainer Bomfim and Flávia Souza Máximo Pereira, addresses the multiple meanings of racism in Brazil, offering insights for an important dialogue between Marxism, racism, and decolonial thought.

The article "The Volkswagen Case in the Amazon: Structural Inequality, Contemporary Slavery, Human Trafficking, and Corporate Relations with the Brazilian Military Dictatorship", by Ricardo Rezende, José Lucas Santos Carvalho, and Rafael Garcia Rodrigues, is a pioneering study that addresses the persistence and continuity of contemporary forms of enslavement in Brazil. This practice was used by Volkswagen during the Brazilian Military Dictatorship (1964-85) and has expanded across various sectors, especially in agribusiness, further intensifying social inequalities today.

As a country positioned on the periphery of the world system, Brazil's integration into central capitalism was established and prolonged by consistently maintaining its condition of dependency by combining the triad of *exploitation*, *plunder*, and *expropriation of labor* – whether in rural areas or, later, in urban settings. In this way, particularly throughout the twentieth century, Brazil entered the industrial sphere, but always preserving its condition as a dependent, late-developing economy subordinated to major foreign capital as asserted by the Brazilian sociologists Florestan Fernandes (1981), Rui Mauro Marini (2002) and Franscisco de Oliveira (2003).

This reality has been deeply aggravated more recently by the expansion of neoliberalism (in the early 1990s) and the consolidation of financial hegemony, which also brought about the explosion of the digital, algorithmic, and artificial intelligence era.

In order to provide an overview in contemporary Brazil, this special issue presents eight articles from different areas in which inequality manifests itself: economy, labor, income, education, environment, race, gender, immigration, and more.

Regarding the world of labor, the article "Inequality that Produces Precarious Work: The Concentration of Income and Wealth also Shapes the Brazilian Labor Market", by José Dari Krein, Marcelo Ferrari Manzano, and Marilane Oliveira Teixeira, offers a depiction of the economic reality showing that, alongside the increase in income and capital concentration, there has been a rise in labor precarization – a trend that is becoming more the rule than the exception.

The article by Lena Lavinas and Guilherme Leite Gonçalves, titled "Brazil: The Assetization of Rights Corroding the 1988 Social Compact", shows how, in the recent trajectory of Brazilian capitalism, financialization has been a central element in deepening labor precarization, increasing the working class's dependence on the financial system, which, in addition to exploiting labor, has intensified processes of expropriation and dispossession.

The article "The Social Precarization of Labor and Inequalities among Workers in Brazil", by Graça Druck, traces the various paths through which precarization has developed in recent Brazil – whether driven by the mechanisms of the capitalist system or legitimized by judicial apparatuses. It argues that this process can only be contained through struggles such as the movement for reducing working hours in present-day Brazil.

The article "Class Conflict and Rising Inequalities. How the Bourgeoisie United to Secure Approval for Labor Reform in Brazil", by Pedro Micussi and Thiago Aguiar, provides a detailed analysis of the role played by the Brazilian industrial bourgeoisie in securing the approval of the (counter-)labor reform carried out by the government of Michel Temer in 2017. This reform was decisive in further increasing the precarization of working conditions in Brazil, whose most evident outcome can be seen in the high levels of labor informality in the country, generating new struggles and social confrontations.

The article "Race, Work, and Social Inequality. Reconfiguring Precarity in the Brazilian Labor Market", by Ruy Braga and Marco Aurélio Santana, offers a solid analysis of how the relationships between class and race present new and decisive components for a better understanding of the deepening and intensification of social and racial inequalities in Brazil.

Moving to education, the article "The Production and Reproduction of Educational Inequalities in the Formation of Brazil's Working Class", by Célia Vendramini, Adriana D'Agostini, Carolina Picchetti Nascimento, and Sandra Luciana Dalmagro, demonstrates how this broad set of economic, social, and political inequalities is also present in

the Brazilian educational process, which ends up reproducing the social inequalities that mark Brazilian society in its multiple dimensions.

As regards the environment, the article "Brazilian Agribusiness and the Ongoing Planetary Ecocider", by Luiz Marques, provides a dense and rigorous study of how the agro-export production model prevailing in Brazil is destructive – both as a driving force of global warming and through the use of agrochemicals – thus increasing environmental, climatic, and social disasters.

With regard to immigration, the article "Brazilians in Motion: Migration, Labor, and Social Reproduction in Japan", by Mariana Roncato, presents a rich and original study on the dimensions of gender and class, based on social reproduction theory, in order to better understand the migratory movements of Brazilian women workers who seek better living and working conditions in Japan.

With this broad, rich, and diverse range of articles, the special issue of *Inequalities* offers a real panorama of the many inequalities that characterize contemporary Brazilian society.

Finally, special thanks must be given to the associate editors, without whom this issue would not have been possible. To Murillo van der Laan (University of Campinas), for his invaluable help in managing all the digital aspects, as well as for his decisive contribution throughout the entire editorial process. Thanks are also extended to Luci Praun (Federal University of São Paulo), Marco Gonsales (University of Campinas), and Ricardo Festi (University of Brasília), associate editors, for their contributions at various stages that made this issue possible.

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Part I
Historical Roots of Brazilian Inequalities

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Struggles, Conflicts, and Inequalities among Indigenous Peoples in Brazil

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Abstract This chapter addresses the multidimensional reality of inequality among Brazilian Indigenous peoples, particularly those of the Solimões River in the Amazon. It argues that socioeconomic exclusion is merely one facet of a deeper problem: the continuous economic and cultural denial of effective citizenship. The roots of this permanent social conflict are anchored in an anachronistic power structure – an unresolved colonial legacy whose violence is reproduced in contemporary struggles for land and rights. The analysis reveals the insurmountable chasm between the legal advancements made after the 1988 Constitution and the material reality of these populations. This gap is perpetuated by the reproduction – at varying intensities across different regions of Brazil – of structural deficiencies and systematic violations that cement exclusion and precariousness.

Keywords Inequality. Brazilian Indigenous peoples. Power structures. Effective citizenship. Colonial legacy.

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1 Colonial Legacy

The current inequality faced by Indigenous Peoples, expressed in their economic life, in the absence of effective guarantees of their rights, and in social exclusion, deepens its roots in a colonial legacy that is still waiting to be overcome. In the field of law, the 1988 Brazilian Constitution intended to redress this colonial wound, but in the material conditions of Indigenous Peoples, the conflicts continue to be embodied as a continued repetition of atrocious violence sedimented throughout history.

These relations of domination and violence were fueled by the colonial fiction that forged an 'Other': distant, strange, and threatening, whose different body became the target of corrective disciplining, subject to evangelization, exploitation, and the dispossession of their place in the world. From the European conquest to the independent republics, these bodies – primarily those of women – were violently dragged onto a stage of unequal and cruel struggle, forced to carve out their own paths for escape and mutual protection. This stage of conflict, invariably called "progress", "development", or "capitalist civilization", constitutes a historical arena that only guarantees the destruction of their territories and the erasure of their ways of life. The historical trajectory of Indigenous Peoples, often aimed at dodging predatory pressures and confronting the attacks that deny their existence, has thus been the core of their struggle for rights and for their recognition as plural social and political actors within the contradictory democratic republic.

The colonial project, in this perspective, being incapable of comprehending those culturally different bodies, proceeds to establish relations of erasure and silencing based, primarily, on what Jacques Sémelin (2002, 12) called the "delirious rationality". The adjective "delirious" alludes to two psychiatric phenomena: first, a "psychotic" type of attitude towards the other, who is represented as the incarnation of evil, as a despicable, "backward, primitive" creature, an object of attack, and an instigator – by thinking and being different – of divine fury. The other does not appear as an interlocutor, is not a "peer", their humanity is suppressed. On the other hand, it is also "delirious" because it exposes paranoid behaviors by conceiving the other as a permanent threat, triggering a dangerous death imaginary in which the annihilation of this other would be the guarantee of the omnipotence of the "us" – *bandeirantes*, landowners (*latifundiários*), industrialists, bankers.

By eliminating the other – seen as an enemy, sometimes animalized, other times as inferior or impure – they believe they conquer death. This prejudiced, monologic, and authoritarian matrix of meanings has been the political orientation, and the cognitive misunderstanding,

with which the Brazilian and Latin American elites have related to Indigenous Peoples.

These historical relations based on violence currently translate into serious situations of injustice and affectation of their humanitarian situation. Brazil has over 1,693,535 Indigenous people, which corresponds to 0.83% of the country's total population, distributed across more than 391 different Indigenous peoples and over 295 languages. According to IBGE, there was an increase in the population living in Indigenous Lands (TIs), rising from 567,582 in 2010 to 689,532 in 2022 (IBGE 2025).[1]

Despite this remarkable demographic growth, the living conditions of Indigenous Peoples suffer from structural vulnerabilities related to the precariousness of economic life and basic sanitation (water supply, sewage disposal, or garbage disposal), legal insecurity over their territories, and permanent threats from extractive pressures exerted by land grabbers (*grileiros*), ranchers, illegal gold miners (*garimpeiros*), and armed factions that dispute illegal commodity routes within their territories (cocaine, timber, gold, weapons, fish).

The trajectory of Indigenous rights in Brazil, from the Lusitanian conquest to the present day in the Republic, is inextricably linked to the economic and political disputes of a colonial project of exploitation. As historical events attest, this project of power not only determined the violence against these peoples but also participated in the formation of the legal framework that supposedly protects them. Thus, the history of these rights reveals a secular struggle for the implementation of full citizenship. Indigenous struggles, in this perspective, play a decisive role: that of forging the consciousness of a nation founded on ethnic diversity and the recognition of difference. If we examine the colonial legal framework, it is evident that from the initial Portuguese legislation through the first Brazilian laws, the original Indigenous rights to their lands and territories were always acknowledged or recognized (Da Cunha 1987, 11). The historical continuity that all current original peoples are the survivors and heirs of the first occupants of Brazil is unquestionable (12).

In this historical-legislative perspective, it is worth highlighting that the mobilization of Indigenous Peoples was decisive for the historical transformation enshrined in the new Constitution (1988), marking a definitive break with assimilationist paradigms and initiating a new chapter in the recognition of their rights. The Political Constitution not only guaranteed the original right to the lands they traditionally occupy but also unequivocally affirmed the importance of ethnic and cultural diversity in environmental

1 In: https://censo2022.ibge.gov.br/panorama/indicadores.html?localidade=BR&tema=4.

policies and territorial security policies, thus configuring the legal mandate for state institutions and security agencies to assume the responsibility of safeguarding their dignity and rights. The current Constitution enshrines Indigenous autonomy, not only overcoming the model of protective tutelage but also recognizing Indigenous Peoples' status as culturally different subjects with full capacity for political-administrative action. This achievement is the result of a long journey of collective struggles that have redefined the place of Indigenous Peoples in the construction of a society that is plural, democratic, and, consequently, in permanent conflict.

One of the explicit evidences of how Indigenous sectors participate in the construction of a multicultural state structure and guarantor of rights has been their achievements and actions in the public sphere, amplifying their own voices and also increasingly occupying spaces of political and institutional representation. For example, by October 6, 2024, an 8% increase in Indigenous representation in elections was registered, reaching over 256 electoral positions, compared to the 236 elected in 2020 (Mendes 2024). Likewise, for the first time in the history of the Republic, a Ministry of Indigenous Peoples was created, headed by the leader Sônia Guajajara, who was appointed in 2023, and also, for the first time, the presidency of FUNAI (National Foundation for Indigenous Peoples) is in the hands of an Indigenous lawyer, Joênia Wapichana, who is currently in office.

From this point of view, it is expected that the unprecedented achievements in Indigenous representation can operationalize the normative frameworks that support them, translating them from the letter of the law to concrete reality. The permanent challenge, however, is to overcome the "constitutional illusion" and demand that institutions fulfill their responsibilities regarding chronic problems: exclusion, the violation of rights, violence, and a scenario of humanitarian insecurity that is historically reproduced. The current moment offers unique opportunities to consolidate institutional competences, strengthen mechanisms for protecting Indigenous rights, and define public policies of shared responsibilities that safeguard their dignity.

2 The Capitalist State and Indigenous Peoples

The achievement of Indigenous rights has not been sufficient to curb territorial conflicts, which persist as symptoms of capitalist pressure on their territories. This reality highlights the shackles of the rentier State, a captive of a profit logic that benefits specific sectors – such as agribusiness, mega-projects (*mega obras*), and the trade of legal and illegal raw materials. This is the essence of the agro-export and extractivist model that predominates in Latin America: an

economic policy that consolidates the power of the business class and large landowners (*latifúndio*), who control rural businesses under a logic of intensive accumulation (Katz 2014), restricting economic distribution. This power of commercial profit, in turn, converts into political power, with these sectors occupying key positions in the State to shape power structures in their favor.

The activities of exploiting raw materials and natural resources bring with them processes of environmental degradation and extermination which, in turn, are accompanied by the action of armed forces that perpetrate violence against Indigenous people and defenders of territorial and environmental rights. This is the warning raised by Victoria Tauli-Corpuz, UN Special Rapporteur on the Rights of Indigenous Peoples, in her September 2018 report. The rapporteur denounces that Brazil, along with Colombia, Mexico, and the Philippines, accounts for 80% of global deaths of Indigenous rights defenders. And of the 312 human rights defenders murdered in 2017, 67% were Indigenous people fighting to defend their territories and rights, almost always against private sector extractivist projects. In recent years, as warned by the report Violence Against Indigenous Peoples in Brazil – 2024, Indigenous Peoples

> sought to guarantee, through occupations and reclamations (*retomadas*), a minimum vital space for subsistence in their own territories, amidst a scenario of despair regarding the advancement of demarcations. In retaliation, they suffered violent attacks: 154 cases of territorial rights conflicts; 230 cases of omission and slowness in land regularization; 857 cases of possessory invasions, illegal resource exploitation, and damage to property; and more than 211 murders. (CIMI 2024)

At the same time, cases of rape and sexual abuse of women and girls are also increasing, showing that, despite social debates and mobilizations, sexism and intolerance are intensifying at an alarming rate – both within communities and in society as a whole (CIMI 2024, 24).

In 2022, the CIMI report Violence against Indigenous Peoples in Brazil recorded 309 cases of invasions and illegal exploitation of resources in Indigenous Lands and 180 murders of Indigenous people. The number of cases of violence against these populations increased considerably during the years of the Bolsonaro administration (2019-23). In 2018, 109 such cases were registered. During the first three years of the Bolsonaro administration, for example, the increases in attacks and invasions against Indigenous territories were notorious, conflicts that were reflected in the institutional environment of offensive against the constitutional rights of original peoples. As indigenous lawyer Marcela Lacerda Macuxi rightly warns, evidence from a study by the UFPR and the Ministry of Indigenous

Peoples confirms that violence against indigenous women grew by 500% between 2003 and 2022. The victims are mostly young, single, and have low levels of formal education. Lack of legal awareness and linguistic barriers emerge as key factors in the underreporting of these crimes (Macuxi 2025).

This is attested to by proposals such as Bill (PL) 490/2007, which sought to render new demarcations unviable and open already demarcated lands to predatory exploitation, and Bill 191/2020, authored by the federal government under the command of Bolsonaro, which proposed to liberalize mining in Indigenous Lands. This set of actions allowed invaders to advance their illegal activities in the territories of Indigenous Peoples. Recently, in early 2023, with the end of the Bolsonaro mandate and the start of the new government, the world witnessed the situation of starvation and destruction in Yanomami territories, through impactful images that circulated in the main international media outlets.

The Bolsonaro administration was guided by an agenda of aggressive agribusiness expansion – based on extensive livestock farming and monocultures such as soybeans, sugarcane, and palm – which promoted the invasion of territories previously designated for land reform and fostered the devastation of ecosystems through burning (*queimadas*). This offensive served a clear project of economic exploitation of areas with already mapped mineral deposits for future extraction. Concurrently, it promoted the systematic dismantling of environmental institutions, with the massive appointment of military personnel to key positions in inspection agencies – surpassing, remarkably, the numbers of the military dictatorship. This political co-option (*aparelhamento*) directly affected critical institutions, such as the Public Prosecutor's Offices in the Amazon border regions and the agencies responsible for environmental control in Indigenous Lands and conservation units, resulting in severe setbacks in socio-environmental rights and protections.

Despite a context marked by high rates of violence, socioeconomic inequality, the persistence of illegal economies, and institutional corruption – a scenario deepened by the devastating consequences of the COVID-19 pandemic on health and social protection systems – Indigenous mobilizations and social movements managed to insert their agendas into the center of the debate of the recently elected governments.

In this perspective, we want to highlight that, in Brazil and Latin America, facing the deep political crises and processes of dispossession, expropriation, and the precariousness of life, various Indigenous collectives and organizations, organized popular sectors, and social minorities are initiating processes of building political ties and articulated relationships, forming vital spaces for political experimentation (Acampamento Terra Livre, Articulação dos Povos

Indígenas do Brasil (APIB); Coordenação das Organizações Indígenas da Amazônia Brasileira (COIAB)), which re-sensitize the social field and propose pathways for common existence.

3 Tensions in the Indigenous Amazon

The Amazon is today the stage for central conflicts on international political agendas. Beyond housing the world's greatest Indigenous cultural and environmental diversity, the region has consolidated itself as a nerve center of environmental politics on the global geopolitical chessboard.

Since the intervention of the rubber slavery regime (1880-1932), the Amazon has always been exposed to fierce predatory forces. Those who suffered the violence of this intervention were the human beings who inhabit the forests and rivers in a non-destructive way: Indigenous peoples, caboclos, riverine populations (*ribeirinhos*), and peasants. The region thus appears, in the prejudiced eyes of the elites, as the last frontier to be conquered, an available reserve – as if it belonged to them – for deepening the "original accumulation" upon forests that harbor large mineral deposits that have been mapped for years and included in future exploration phases. Moreover, in the minds of businessmen in major Latin American cities, when the Amazon is not an uninhabited landscape, it is a prosperous land where germinate those beings considered "obstacles to progress, hindrances to development": forbidden characters, incomprehensible chants, savage Indians, cannibal creatures, guerrillas, outsiders of the market and bureaucracy, a place of godless fugitives, a territory where, in the eyes of the State, the nation's nightmares sprout. From this perspective, this territory deserves to be civilized, sold, Christianized, and statized with the arms of the homeland.

It is difficult for the hegemonic society to impose itself completely in the equatorial jungles and frontiers of America. In these territories, it is forced to continually dispute the consent and obedience that its power enjoys in other spheres of national life. In the Amazonian rivers, state political plans are constantly challenged by diverse actors who attempt to build their own social order, which, while not free from conflicts and injustices, is considered an illegal and threatening disorder simply because it contests the dominant instructions.

This entire process of extractive, racist, and predatory intervention, as stated, dates back to the bloody rubber era and has not stopped. Even during the Workers' Party (PT) governments (Lula 2003-11, Dilma 2011-16), there were no direct policies to reverse the forces of economic exploitation over the Amazon; deforestation was not contained. The Dilma governments (2011-16) were the ones that demarcated the fewest Indigenous lands and even initiated the

construction of the intrusive and catastrophic mega-project of the Belo Monte Hydroelectric Plant in the Xingu River basin, a clear example of "internal colonialism" that destroyed the lives of the Indigenous Peoples Kayapó, Arara, Arareute, Apidereula, Juruna, and Maracanã. As journalist Eliane Brum has insisted, following the construction of Belo Monte places us before the anatomy of ethnocide. This happened precisely because the PT governments, even with their concern for basic rights and the reforms that improved the lives of millions of Brazilians, acted as administrators of capital, assuming bureaucratic and political pacts with their secular class antagonists.

The PT, it should be emphasized, never managed to escape the structural ills of the rentier State, which serves a peripheral, dependent capitalism marked by its primary extractive-export function in the global accumulation system. That is, dependence and delays determining the course of the country's political-economic history. The PT's political project was not transformative; it was an amplifier of the consumption model, and it accentuated commodification – that is, the subjection of life to the imperatives of capital. With Bolsonaro, extractive actions reached alarming levels, exacerbating conflicts, hence his perverse campaign declaration that he would "not demarcate one more centimeter of Indigenous lands". The Indigenous leader Ailton Krenak had already warned: "there was no discovery; it is a continuous invasion, and the State has been and is the main mobilizer of this invasion – the entire apparatus of the State with its agencies".

One only needs to look at the statistics to get an idea, not of the threats, but of the irreversible disasters: Brazil is an Amazonian country (49% of its territory is the Amazon) and, up to 2010, had deforested more than 763,000 km² (an area equivalent to 184 million soccer fields and three states of São Paulo) (Nobre 2014, 5). Consequently, as recently warned by professors Thomas Lovejoy and Carlos Nobre in the Science Advance editorial (Lovejoy, Nobre 2018), "the Amazonian system is close to reaching its tipping point". This means that the Amazon ecosystem, responsible for producing half of the rainfall, could alter its hydrological cycle if it reaches 40% deforestation.

The most aggressive droughts of 2005, 2010, and between 2015 and 2016 constitute the first indications of the approach to such a point of no return. Currently, the deforested area of the greater Amazon region reaches about 20%, a reality that is aggravated by the degrading factors of the smoke plumes from the burning of cleared forest for agricultural activity during dry periods and global climate change, a combination sufficient for the "tipping point" to be determined at 20-25% of the deforested area. In 2024, one hundred years after the atrocities of the rubber slavery, an inopportune arrival of the drought was registered, usually expected between August and

September and not in July as happened this year. All cartography, across various themes, geographical facts, and sociodemographic cross-referencing, shows the Amazon marked by reddish circles, resembling diseased lesions (or festering wounds) that affect all the elements (or bodies) that compose it. These processes of degradation and environmental extermination are accompanied by the action of the armed forces, which exert violence against Indigenous people and defenders of territorial and environmental rights.

Focusing on the conflicts experienced by Indigenous people – particularly the Magüta (Tikuna), Kambeba, and Cocama peoples on the Brazil-Colombia border – we confirm the warnings of the *Cartographies of Violence in the Amazon* report (FBSP 2023). This document highlights that the Amazon region is one of the most violent in Brazil, serving as a stage for conflicts, disputes over illegal markets, violence against women, and the ongoing intervention of economic and political forces over diverse Indigenous territories and ways of life. The structure of exclusion and sexist violence against women, for instance, constitutes a severe situation of gender exclusion that must be addressed and mitigated through urgent public policies. What has been evidenced by different studies, diagnoses, and reports[2] is that the municipalities that make up this region have experienced high indices of social vulnerability, economic informality, and human rights violation, with very high rates of unsatisfied basic needs (0.499) and extremely high inequality (above 0.55) (Cortés Carvajal et al. 2020), being marked by the presence of fragile public institutions, with security agencies facing limitations in concrete geographic operations that allow for the effective resolution of common population problems (Cortés, Carvajal et al. 2020).

According to data from the 2022 Demographic Census, the absence of adequate public policies for the Amazonian region, especially concerning Indigenous and riverine populations, can be confirmed once again, facts that directly impact the local demographic dynamics. The lack of investment in infrastructure, education, health, and basic sanitation leads to a rural exodus, with young people migrating to urban centers in search of better life opportunities.

The consequences of the absence of public policies are: 1.) Aging of the rural population: With the departure of the youth, the rural population ages, which can compromise the transmission of knowledge and food autonomy; 2.) Environmental degradation: The search for alternative sources of income, such as the illegal exploitation of natural resources, can accelerate environmental degradation and the loss of biodiversity; 3.) Increase in violence: The violent dispute over

2 In: Rapozo, Silva 2020; Carvajal Cortes et al. 2020; Instituto Igarapé 2022; Sérgio de Lima 2022; Santos, Parreira, Hoff da Cunha 2024.

illegal commodities and natural resources, the lack of opportunities, and the presence of organized crime contribute to the rise in violence rates in rural communities; 4.) Weakening of cultural practices: The loss of territory, the change in consumption patterns, and the influence of external cultures can lead to the weakening of cultural life (Do Carmo 2024).

It is important to highlight that in the Amazonian border regions, as Carlos Zárate (2017) rightly warns, the violent dynamics have a historical relationship with the development of the policies of the Brazilian, Colombian, and Peruvian national States, as well as their policies and forces for the exploitation of nature, often accompanied by militarization plans for these international areas. Regarding border policies, in geopolitical and social relations terms, it must be considered that the international limits of Brazil, Colombia, and Peru are still treated primarily as a military matter, defining a conception of the border that disregards the network of inter-ethnic, economic, and cultural ties and relationships. This conception privileges, above all, a military approach to the defense of national sovereignty and the fight against illegal economies, drug trafficking, illegal mining (*garimpo*), timber exploitation, and the combat of criminal factions (Raposo, Silva 2020, 76).

To understand the nature of the conflicts and violence affecting the Magüta, Kameba, and Cocama Peoples of the Upper Solimões River, on the border between Brazil, Colombia, and Peru, with greater clarity, it is essential to transcend the limited perspective of national borders. The problems faced by these communities are not restricted to the framework of the nation-state but manifest themselves in a cross-border manner, affecting lives and territories beyond political divisions. Overcoming what Ulrich Beck (2005) called "methodological nationalism" allows us to un-blur the restricted vision of local economic and geopolitical dynamics. In this way, it is possible to clearly see phenomena such as the trafficking of illicit drugs and associated criminality, which are violently and detrimentally imposed upon the Amazonian Indigenous Peoples.

From this perspective, it is possible to categorize the afflictions and problems that violate Indigenous rights into two interconnected fields, each involving specific experiences, risks, and concerns:

External tensions and conflicts, which transcend the autonomous control of Indigenous organizations and demand the intervention of security agencies and state institutions for their resolution; and Internal tensions and conflicts, which can be addressed through community work, with the protagonism of local authorities and organizations. However, this does not waive the need for support and backing from other actors, such as institutions, universities, and strategic allies, who play a crucial role in the defense and promotion of Indigenous rights.

Both fields require complementary approaches, recognizing the complexity and interdependence of the challenges faced by these communities.

4 External Tensions and Conflicts

4.1 Narcotrafficking and Violence

According to reports from the Indigenous inhabitants of the Upper Solimões River region themselves, corroborated by other studies (Cdesc, Senad/MJSP 2023, PNUD, UNODC) and diagnostics from the Brazilian Forum on Public Safety (FBSP 2023), it becomes evident that the activities of processing, transporting, and trafficking of illicit drugs in Indigenous territories represent a grave humanitarian problem. This reality is not limited to episodes of violence resulting from disputes between criminal factions for control of the illegal market; it also includes invasions of Indigenous lands, the violent dominion of rivers as transport routes, the coercive recruitment of youth, and their exposure to drug consumption.

The core of this problem lies in the actions, both legal and illegal, violent and non-violent, of organized crime as an economic enterprise and geopolitical control in the Legal Amazon, primarily between the two main criminal groups in Brazil: the First Command of the Capital (PCC) and the Red Command (CV). However, beyond these, there is an "ecology of logistical relationships" among various regional illegal groups. This involves a set of coordinated activities executed under the command of a hierarchy or leadership that, through the use of coercion, guarantees the flow of illicit markets. These activities range from the hiring and execution of services – such as transport, surveillance, provision of cover and hideouts – to the bribing of authorities, thereby ensuring the continuous operation of the illegal business through regionally distributed tasks.

In this scenario of violent disputes for control of the cocaine business, as is predictable, the rates of violence and crime have increased. This violence by criminal groups in the dispute over illegal markets, which manifests in different intensities at the local and state levels, alarmingly threatens the lives of Indigenous Peoples. Just to get an idea of the landscape of violence in the Legal Amazon, and as warned by the Brazilian Forum on Public Safety (FBSP 2023):

> In 2022, more than 8,000 people were victims of intentional lethal violent crimes—a category that includes deliberate homicides, armed robberies resulting in death (*latrocínios*), and bodily injuries followed by death—in the region. At the regional level,

> the death rate per 100,000 inhabitants was 26.7 in the states of the Legal Amazon, while in the other states the index was 17.7. That is, the intentional lethal violence rate in the Legal Amazon is 50.8% higher than the rate in the other Federative Units (FUs). In Brazil, the average murder rate was 19 per 100,000 inhabitants in 2022. Among the states that compose the Legal Amazon, Amazonas presented the highest rate of intentional lethal violent crimes in 2022: 33.1 per 100,000 inhabitants, totaling 1,432 murders during the year. […] The rate of deaths caused by police is also higher in the Legal Amazon region compared to the rest of the country. In 2021, 1,057 people were killed by military and civil police in the region, a rate of 3.6 per 100,000 inhabitants. In the remaining Brazilian states, the rate was 2.8 per 100,000. Between 2018 and 2021, while deaths by police grew 5.1% in the Amazon states, there was a 4.2% reduction in the rest of the states. (FBSP 2023, 5)

It must not be overlooked that the circumstances of violence are linked to a permanent situation of socioeconomic inequality and precariousness that primarily affects Indigenous Peoples. In this region, the State is the main contractor and job generator, often concentrated in the military field and the basic bureaucratic structure, with a restricted domestic market for legal businesses and scarce employment, which makes it a region of difficult access where illicit activities thrive (Crisis Group América Latina 2024, 2).

4.2 Environmental Crimes

As has been widely documented and warned by Indigenous Peoples themselves, the Amazonian border region also features a concentration of land conflicts stemming from the invasion of Indigenous Lands and land grabbing (*grilagem*) of public lands, as well as environmental crimes due to illegal logging and mining (*garimpo*), in addition to biopiracy and predatory fishing (FBSP – Cartographies of Violence in the Amazon 2023, 51). Many of these extractive intervention actions are driven by narcotrafficking bosses or people directly involved with the illegal cocaine trade and money laundering (Rapozo; Conceição da Silva; Carvalho Coutinho 2024, 31).

As demonstrated by the Amazon Geo-Referenced Socio-Environmental Information Network (RAISG) (2019), there is an evident and directly proportional relationship across the entire Amazon between cattle ranching activity and deforestation. This is, in turn, confirmed by INPE studies, which registered a deforestation rate of 10,851 km² in 2020. This rate showed an increase to 13,038 km² in 2021, representing a 20.15% increase in the deforested area rate (FBSP – Cartographies of Violence in the Amazon 2023,

95). This increase is mainly linked to the opening of pastures, timber commercialization, and monoculture cultivation, reaching a cumulative total of 481,869 km², which corresponds to 10% of the Legal Amazon's territory. However, in 2022, a reduction in this rate was registered to 11,594 km², a fact that had not occurred since 2017 (FBSP – Cartographies of Violence in the Amazon 2023, 95).

The Upper Solimões River on the border is today a contested territory. This dispute is dual: on one side, a predatory pillaging that treats the region as a reserve to be looted through illegal extraction, cattle ranching, and monocultures. On the other, its consolidation as a logistical network for criminal enterprises, involving narcotrafficking, arms trafficking, and illegal mining that enslaves Indigenous people. Merging these two fronts is a prevailing conception of the forest as a great mineral deposit, a long-standing project that completely ignores the environmental agenda.

In this scenario of complex conditions involving the violation of rights, the presence of criminal group actions, and the reproduction of forms of violence, a critical situation is exposed – as Indigenous authorities and community guards have well warned – where social, economic, political, and environmental conflicts converge and intertwine.

5 Internal Tensions and Conflicts

Internal conflicts among Indigenous Peoples are intensified by an external context of violence, inequality, and precariousness. This perverse dynamic generates a self-destructive cycle: the violence of invaders and criminal factions disaggregates social relations, undermining community cohesion and trust. With social ties weakened, criminality emerges as a tangible option, recruiting vulnerable Indigenous youth not only as labor but also as new consumers for the drug market.

The multidimensionality of Indigenous inequality – expressed in structural deficiencies, exclusion, and the denial of effective citizenship – constitutes the fertile ground where internal conflicts proliferate. In this context of vulnerability, a phenomenon reported with growing alarm in the Solimões River region is the invasion of evangelical churches. Such groups, far from exerting a mere religious influence, abusively interfere with community autonomy, operating a moral control that stigmatizes traditional practices and weakens the Indigenous social fabric.

6 Concluding Remarks

As stated, the effective absence of rights and the severe lack of public security and territorial protection render the Indigenous Peoples of Brazil, and primarily those of the Upper Solimões in the Amazon, vulnerable to the actions of organized crime. The factions that dispute control of the illegal border markets profoundly impact the ways of life and the social organization of these populations.

Consequently, it is essential to propose recommendations and solutions that can guide the actions of state institutions responsible for public policies and security agencies. One of the main recommendations, raised by Indigenous inhabitants in the Amazon, in addition to the demarcation of Indigenous territories, is the regulation of public security policies in Indigenous border territories. Another relevant aspect is to recognize and support Indigenous collective initiatives for mutual protection, such as community security guards, which are forms of collective action that require official regulation.

As the Amazonian Indigenous Peoples themselves have warned, and as local experiences in territory defense have shown, including the recommendations of the Brazilian Forum on Public Safety (2023), a governance model that can truly guarantee public security in the Amazon must rely on the participation and protagonism of Indigenous Peoples, including their Indigenous guards, as direct knowledge holders of the violence and conflicts suffered (2023, 51).

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Capitalism, Racism, and Inequalities in Brazil

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Abstract What is the historical origin of racial inequalities in Brazil? Several studies have highlighted the existence of structural racial inequalities in health, education, access to land and housing, as well as in the Brazilian labor market. Far from being a simple legacy of slavery or an epiphenomenon of economic inequalities, these inequalities reflect the place of racism in class exploitation in the country. Drawing on the Marxist and anti-racist theory of Frantz Fanon, this paper argues that the specificity of the colonial situation is characterized by naked violence, driven by the super-exploitation of labor, democratic fragility, and the ontological dehumanization of colonized peoples. In this scenario, racism played a fundamental economic role by imposing a racial distribution of class contradictions.

Keywords Capitalism. Colonialism. Racism. Class struggle. Inequalities.

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1 Racial Inequality in Brazilian Social Thinking

When investigating the dynamics of racial relations in Brazil, it is observed that inequalities are not merely a historical legacy of a slave-holding past, but above all, a social problem that updates itself in the present. Several studies have highlighted the existence of structural racial inequalities in healthcare (Oliveira et al. 2024; Costa et al. 2025), education (Manequinha 2025), access to land and housing (Benini et al. 2025), as well as in the Brazilian labor market (Sousa et al. 2025).

In the present study, I present a specifically Fanonian perspective on racial inequalities in Brazil. Although Frantz Fanon's thought is claimed by diverse theoretical traditions – such as culturalist/post-structuralist (post-colonial, decolonial, counter-colonial, Afropolitan, queer theory, etc.), Afrocentric, and Afro-pessimist – this analysis engages in dialogue with a broad Brazilian Marxist tradition ranging from Clóvis Moura (1925-2003) to Florestan Fernandes (1920-1995), including thinkers such as Caio Prado Jr. (1907-1990), José Chasin (1937-1998), and Lélia Gonzalez (1935-1994)

Racial relations are an old theme in Brazilian social sciences. The country has always been perceived as multi-racial and diverse. However, there was resistance to recognizing the inequalities between whites, blacks, and indigenous people. From Donald Pierson's romantic notion of a "multiracial class society" ([1942] 1971) to the critical recognition of racial prejudice in Florestan Fernandes' *The Integration of Blacks into Class Society* (Fernandes 1965), there has been intense debate about the specificity of race relations and, therefore, of Brazil's social formation itself (Iasi 2019).

If Pierson ([1942] 1971), an important proponent of the Chicago School in Brazil, contributed to strengthening the myth of racial democracy based on the idea that racial prejudice did not exist in Brazil, Fernandes (1965), contributed to demystifying this ideology by using qualitative and quantitative data that demonstrated the existence of prejudice. However, he interpreted prejudice as a kind of remnant inherent to the backward nature of the bourgeois revolution. A remnant that could disappear with progress or democratic revolution. This position would be revised decades later (Fernandes 1989).

However, it was with Argentine sociologist Carlos Hasenbalg's sociology of stratification that inequalities between blacks and whites begin to be measured and analyzed as the result of the type of economic development – characteristic of dependent capitalism – rather than its stagnation (França 2024). In *Discriminação e desigualdades raciais no Brasil* (1979), the Argentine sociologist demonstrates that racial discrimination does not stem from democratic stagnation, but from a specific model of political – and, at times, democratic – evolution that updates and intensifies racial inequality.

By observing what he called social stratification and the societal mechanisms that reproduce inequalities, Hasenbalg, in harmony and collaboration with important black intellectuals – notably Lélia Gonzalez – offered important theoretical and empirical contributions to the denunciation of racism and, above all, the complex relationship between capitalism, racism, and sexism in the Brazilian context (Gonzalez 1982; 2020).

Even so, despite this evidence, the so-called "myth of racial democracy" persisted – and still persists – serving on disqualifying complaints about racism in Brazil, demobilizing and delegitimizing the struggle for racial justice. The main focus of the Unified Black Movement Against Racial Discrimination (MNUDCR, now MNU), created in 1978, was to denounce racism, given the depth and scope of the myth of racial democracy in all Brazilian social sectors. The following decades were marked by intense theoretical, political, and ideological struggles that paved the way for the proposal and demand for public policies of equality (Ribeiro 2014).

Since then, Brazil has undergone significant changes in social perceptions of race relations (Silvério 1999; Rios, Maciel 2013). Gradually and with great difficulty, the fetishized paradigm of a supposed racial paradise is increasingly being challenged by a broader, but far from consensual, awareness of the historical and structural inequalities that have accompanied us since the period of slavery. In addition, new interpretive paradigms have begun to influence the debate on racism, some of which are in direct tension with the paradigm of racial inequalities that has dominated the field of race relations.

The studies by Silvério (2004), Costa (2006), and Silva (2007), each in their own way, are emblematic of a tension with the field of race relations by shifting the focus of analysis from racial inequalities to culture, subjectivity, and imagination. This shift in focus will take place in dialogue with the anti-racist reception of the philosophy of difference and post-structuralist thought in Brazil through the arrival of theoretical-epistemic traditions such as *postcolonial*, *decolonial*, *Afro-pessimist*, *Afropolitanist*, etc., but also from the production of its own matrices, such as *contracolonial thought* and *black feminist poetics* (Faustino 2022).

In this essay, I align myself with another tradition – composed of names such as Jacob Gorender (1923-2013), Clóvis Moura (1925-2003), and Lélia Gonzalez (1935-1994) – which also emphasizes the empiricist and sociometric dimension of studies on inequality, recognizing the relevance of the cultural and subjective dimensions of domination, but strives to position these dimensions within the dynamics of class struggle in Brazil.

This movement, however, implies situating the Brazilian and Latin American class struggle within this historical context in which capitalism was consolidated through colonization rather than

through the endogenous development of its own productive forces. The particularity of the colonial situation is naked violence, marked by the superexploitation of the workforce, democratic fragility, and the ontological dehumanization of colonized peoples. It is a scenario in which racism, as an ideological weapon of domination, plays a fundamental economic role.

The question that drives this study is: What is the role of racism in a country like Brazil, where social cohesion, in its tortuous path to capitalism, came about through colonialist slavery?

2 Racism, Equality, and Inequality in the Universalization of Capital

It is true that the structural inequalities constitutive of capitalism have prevented the promised freedom and equality from being substantially achieved by the subordinate classes in the central countries. Only through intense struggles by the working class have certain civil, social, and political rights been relatively universalized in these countries. Even so, the consolidation of bourgeois civil society implied not only the recognition of the individual as a natural political subject, but also the construction of certain mechanisms of protection and social cohesion that legitimized the monopoly of state violence.

According to Karl Marx ([1867] 2013), the original expropriation that freed peasants from feudal servitude, condemning them to the inescapable clutches of abstract labor, transformed them into free subjects compelled to sell their labor power (or starve to death) in any corner of the world. At the same time, abstract labor would not be feasible without the legal and formal construction of an abstract subject: the citizen, free and equal before the law. But there is, according to Marx, another side to this equation that has not been revealed: colonialism and slavery.

The colonial system was a form of expropriation indispensable to what Marx called "the so-called primitive accumulation of capital". In Chapter 25 of *Capital*, entitled "The Modern Theory of Colonization", the German philosopher discusses the importance of colonies for the universalization of capital and, above all, for European metropolises' access to the raw materials necessary for the development of capitalism:

> The colonial system nurtured trade and navigation like plants in a greenhouse […] The colonies provided a market for the growing manufacturing industry and enabled accumulation through market monopoly. The treasures plundered outside Europe directly through looting, enslavement, and murder flowed back to the metropolis and were transformed into capital there. […] Hence the preponderant role that the colonial system played at that time.

> […] This system proclaimed the production of surplus value as the ultimate and sole purpose of humanity. (Marx [1867] 2013, 835-50)

In the same vein, Martinique psychiatrist Frantz Fanon stated – almost a century later – that it was "the sweat and corpses of blacks, Arabs, Indians, and Asians" in territories outside Europe that allowed class exploitation to be accompanied by strategies of control and cohesion, which presuppose, at the very least, the recognition of the humanity and relative "well-being" of the exploited (Fanon, [1961] 2022, 116-17). He therefore argued that Europe is "literally the creation of the Third World. The riches that suffocate it are those stolen from underdeveloped peoples" (Fanon, [1961] 2022, 122).

There are important consequences to be drawn from these conclusions: the dialectical relationship between capitalism and colonialism and, above all, the relevance of racism to the development and consolidation of capital. Karl Marx, aiming to exemplify the social character of value production, stated that "a black man is a black man. It is only in certain relationships that he becomes a slave" (Marx, [1867] 2013, 161). Frantz Fanon goes further by suggesting that it is only in certain circumstances that someone is seen as black. In other words, "it is the white man who creates the black man (*nègre*)" (Fanon 1959, 32), at the very moment when he does not recognize his humanity (Faustino 2013).

Colonization and racism allowed for the universalization of violence, exploitation, and capitalist expropriation without having to universalize political, civil, and social rights: if slaves were recognized as having the attributes that the European liberal bourgeoisie defined as "human", they could not be slaves. Thus, ethics, politics, and aesthetics, as well as the bourgeois premises of law, specific to the modern social contract, are suspended. Those who are considered colonized, black, Arab, gypsy, terrorist, drug trafficker, etc., automatically lose their status as unique individuals and, above all, as generic humans, and can be displaced, imprisoned, or exterminated without causing an ethical crisis (Faustino 2021).

This Eurocentric universalism allowed, for example, the Enlightenment bourgeoisie to continue defending freedom and equality as ontological human attributes while becoming astonishingly wealthy from real slavery in the colonies. Slavery and democracy, therefore, emerge as different sides of the same modern coin.

At a first level of analysis, Frantz Fanon emphasizes how racism and racialization – implicit in the colonial situation – are part of a larger process of domination: the violent and unequal expansion of capitalist relations of production into the non-European world: "racism is not a whole, but the most visible, most everyday, and, at certain moments, the crudest element of a given structure" (Fanon 1964, 35). For this reason, it would be incorrect to believe that the social forces that

wage colonial war do so with a mere cultural confrontation in mind. On the contrary, "war is a gigantic commercial enterprise, and the whole perspective must take this into account. The first necessity is the enslavement, in the strictest sense, of the indigenous population" (Fanon 1964, 37-8).

However, colonization is not viable without a set of ideological, cultural, and subjective elements.

> Expropriation, dispossession, raiding, and objective murder unfold into a plundering of cultural schemas or, at least, condition this plundering" (Fanon 1964, 38), engendering epidermal social positions, which, marked by a racial division of labor, presuppose the place of individuals based on phenotypic and cultural markers. For Fanon, racism is therefore both a product and a process by which the dominant group seeks to dismantle the possible lines of force of the dominated, destroying their values, reference systems, and social landscape: once "collapsed, the lines of force no longer command. In their place, a new set is imposed, not proposed, but asserted, with all the weight of cannons and sabers" (Fanon 1964, 38)

This is not to say that racism is an epiphenomenon of class contradictions, much less that it would dissolve in the face of abstract solidarity among the proletarians of the world[1] but, on the contrary, it is deployed in modern society as an element that makes colonial enterprise possible, so vital, at first, to the primitive accumulation of capital and, secondly, to the uneven and combined export of the contradictions implicit in the system to its global periphery (Fanon, [1961] 2022). This practice of denying humanity was not only restricted to colonially occupied territories, but also became a structuring axis of modernity itself, as he emphasizes: "Yes! European civilization and its most qualified representatives are responsible for colonial racism" (Fanon 1952, 88-9).

On a second level of analysis, Fanon draws attention to the subjective internalization, on the part of the colonized, of the complexes arising from the colonial situation. The racialization of the colonized's experiences marks their relationship with the world and with themselves, giving them a distorted self-image.

1 This position is clear in a critical dialogue that Fanon establishes with the French Left during the Algerian liberation struggle: "At this level, reflection allows us to discover an important particularity of the Algerian colonial situation. Within a nation, it is classic and commonplace to identify two antagonistic forces: the working class and bourgeois capitalism. In a colonial country, this distinction proves to be totally inadequate. What defines the colonial situation is much more the undifferentiated character of foreign domination" (1964, 9).

The first aspect of racialization is the epidermalization of places and social positions, that is, what is understood as race becomes the defining factor of the opportunities and barriers experienced by individuals throughout their lives. The colonized become confined to their bodies, almost always regarded as crude, rustic, savage, and emotionally unstable, in contrast to Europeans, who are always presented as the universal expression of qualities useful for controlling the world. Both the supposed Europeanization of reason or the subject and the reified objectification of the black – or non-white/Western/European – are expressions of this same process of racialization. The second aspect of racialization – without which the rest would not be possible – is the subjective internalization of this epidermalization by both the colonizer and the colonized. It is the moment when individuals cease to recognize each other as mutually human and begin to see themselves and each other through the distorted lens of colonialism.

Although white people enjoy privileges of all kinds, they are not exempt from racialized reifications, because by attributing to the "Other" human elements that are also theirs, they alienate themselves from their own humanity. The inferiority complex imposed on black people is proportionally accompanied by a superiority complex on the part of white people, but this complex is marked by a feeling of castration (Fanon 1952, 147). This "Other", cursed and inferiorized, haunts and attracts with its "superhuman" attributes – precisely those that white people fail to see in themselves – exaggeratedly mystified and animalized.

These aspects are fundamental to investigating the role of racism in Brazil's particular insertion into capitalist development.

3 The (Colonial) Roots of Racial Inequalities in Brazil

It is important to remember, as Frantz Fanon (1964) pointed out, that racism is a constituent part of bourgeois society, but it takes on particular expressions in time and space. Segregationist racism in the US differs from assimilationist racism in France. Similarly, the particular dynamics of each type of colonialism mean that racism in Algeria, a French settlement colony, is different from racism in Mali or Niger, French exploitation colonies. Similarly, the religious racism that underpinned mercantilist slavery at the beginning of the colonial experience differs from the scientific racism and eugenics characteristic of monopoly imperialism in the late nineteenth and early twentieth centuries.

The crisis of this ideology – made possible both by the defeat of Nazism in World War II and by the liberation struggles in the period that followed – did not result in the end of racism, but in its mutation

into a new form, more suited to the neocolonial and liberal interests of the postwar period: cultural racism. These temporal and spatial expressions of racism are related to the particular dynamics of class struggle in each context of global capitalism. Capitalism and racism, therefore, must be thought of dialectically as a historically determined part of the same complex of complexes (Faustino 2021).

The consolidation of capitalism in countries of colonial origin, such as Brazil, acquires economic and social characteristics that differ both from classic capitalist cases, such as France and England, and from more backward cases such as Germany, Italy, Portugal, and Japan.[2] Although Brazil is the only former colony that, for a short period, took the place of the Metropolis,[3] its economic organization remained subordinated to external interests, particularly British ones.

In countries where capitalism was classically established, the relative universalization of civil, political, and social rights was conceived – even if abstractly – as a prerequisite for the generalization of abstract labor and bourgeois civil society. Therefore, as Fanon reminds us

> European states achieved national unity at a time when the national bourgeoisie had concentrated most of the wealth in their hands. Merchants and artisans, civil servants, and bankers monopolized finance, trade, and science at the national level. The bourgeoisie represented the most dynamic and prosperous class. Its rise to power allowed it to embark on decisive operations: industrialization, development of communications, and soon, the search for markets "overseas". (Fanon [1961] 2022, 116)

The result is a complex combination of labor exploitation and the rule of law – albeit fragile, temporary, and achieved through historic struggles by the working class – which has enabled important democratic advances. In European countries (and Asian countries such as Japan) where capitalism developed later, authoritarian

2 Karl Marx sought to understand the particularities of capitalism's development in each country. In texts such as Introduction to the Critique of Hegel's Philosophy of Right (1843), On the Jewish Question (1844), The German Ideology (1845), and some articles in the New Rhenish Gazette (from the late 1840s), he sought to understand the particularities of German capitalism, which he saw as lagging behind the classic cases (Silva 2020).

3 This refers to the occasion when Dom João VI settled with the Royal Family in Brazilian territory in 1808, fleeing from Napoleon, transferring the seat of the Monarchy to Rio de Janeiro and triggering significant urban growth and relative political autonomy in the former colony. This metropolitan inversion sparked a series of political events that resulted in the Declaration of Independence in 1822 and the proclamation of the Empire of Brazil – governed by the direct descendants of Dom João – until the proclamation of the Republic in 1889, one year after the abolition of slavery.

political closure – in its ultra-nationalist and chauvinist appeal, systematic restrictions on individual freedoms, and theoretical and philosophical adherence to irrationalism – led these societies, under the financial-monopolistic competition of imperialism, to fascism and Nazism in the early twentieth century.

At the same time, aggressive external competition and internal authoritarianism allowed for such an accumulation of capital that enabled them to compete, more or less successfully, for political and economic leadership in the capitalist race in Europe, or at least to achieve a high level of internal economic development that did not dissolve even after the defeats of the First and Second World Wars.

In a relatively distinct path from this, the particular characteristic of Brazilian social formation is the fact that it was engendered from, and as a function of, colonialism. As José Chasin explains:

> The bourgeoisie that emerged through the Colonial Way does not even fulfill its economic tasks, unlike the true Prussian bourgeoisie, which, as Engels points out, only fails to fulfill its political tasks. So, while both perspectives are completely foreign to a liberal democratic political regime, on the other hand, the Prussian bourgeoisie pursues an autonomous economic path, centered on and driven by its own interests, while the bourgeoisie produced by the Colonial Way tends not to break its subordination, remaining tied to the hegemonic poles of the central economies. (Chasin 1980, 128-9)

In the United States, colonization allowed for the creation of a dynamic economy and bourgeoisie that sought not only the development of internal productive forces and political and financial independence, but also the end of slavery. In Brazil, political independence from Portugal occurred under the control of the Portuguese court at the time when Dom João Sexto was fleeing from Napoleon. Even so, the so-called independence did not alter the relations of production in any way: a slave-based economy based on the predatory export of primary goods remained.

Brazilian decolonization was "unsteady and superficial" (Fernandes 1979, 13) and, therefore, incapable of absorbing the needs and demands of the lower classes and, above all, as philosopher José Chasin points out, of positioning itself autonomously in the international economic arena (Chasin 1982). In this type of social formation, national evolution and social progress are mutually exclusive (Chasin 1989) and the privileged "do not give up any particle of privilege and brandish, for any reason, the bladed weapons of slaughter and their 'sacred' flags that place private property and initiative above their religion, their homeland, and their family" (Fernandes 1986, 74-5).

The bourgeoisie that emerges from the colonial path is weak and anti-democratic, as was the Prussian bourgeoisie, but, unlike the latter, it is incapable, on its own initiative and strength, of breaking with its subordination to imperialism (Rago 2010) and, at the same time, always willing to repress with iron and fire any demand for justice coming from the working classes. It is noteworthy here how closely Fanon's description of the colonized bourgeoisie resembles that diagnosed by Brazilian economists and historians (Fernandes 1979; Moura 1994; Prado 2000). Once again, with Fanon, we see that:

> The bourgeoisie in underdeveloped countries is a bourgeoisie without spirit. It is neither its economic power, nor the dynamism of its cadres, nor the scope of its conceptions that guarantee its status as bourgeoisie. […]. If power allows it the time and opportunity, this bourgeoisie will manage to build up a small "nest egg" for itself, which will reinforce its domination. But it will always prove incapable of giving rise to an authentic bourgeois society, with all the consequences and industries that this implies. (Fanon [1961] 2022, 207)

One of the results of this colonial equation is that the main historical transformations in the country did not occur through ruptures or structural reforms "from the bottom up" that could benefit the condemned of the earth, but through what Florestan Fernandes called "transactions" (Fernandes 2014, 127), that is, high-level conciliations that continue to this day: we entered capitalism through colonization; we ceased to be a colony without breaking with slavery; we emerged from slavery without agrarian reform; we became a republic through a coup d'état that did not break with the agro-export pacts; we industrialized late under the superexploitation of labor (Marini 1996) and successive corporate-military dictatorships (Chasin 1989); we left the dictatorships without breaking with the dictators… (Fernandes 2014) and so it has been until the present moment, condemning the masses to poverty, food insecurity, and precarious work and living conditions.

In this context, anti-Black and anti-Indigenous[4] racism plays a fundamental role not only in managing the legacy of slavery but also in maintaining the continuity of violence and labor superexploitation. As the Brazilian sociologist explains when considering the role of racism in the particular dynamics of the Brazilian class struggle:

4 There is no space here to comment on the consequences of this process for indigenous populations in Brazil. It should be noted, however, that violence against these populations continues to be expressed through a logic of genocide. This genocide has taken on unprecedented dimensions with the arrival of the pandemic in indigenous territories and communities.

> Brazilian racism is not, disconnected from the country's socioeconomic and political conditions, from the position of the black population in civil society, a sphere of material relations of production and reproduction of life, which refers to the social classes that constitute this society, as well as their relations of domination and subordination, which characterize the colonial path of capitalist objectification. (Sobrinho 2025)

Racism ultimately produced both the naturalization of social relations and the racial blaming of "oppressed and discriminated non-white segments, and blacks in particular" for "social, economic, and cultural inferiority" (Moura 1988, 65)[5] that resulted from this subordinate (colonial) stance. This is not to say that racism is specific to peripheral capitalist economies – quite the contrary, racism can be observed throughout the modern world, but also acts as one of its foundations (Fanon, [1961] 2022). But it is important to recognize its genesis and peculiar function in a sociability where "the new always pays a high tribute to the old",[6] that is, a modernization that "conditions and feeds on the preservation of colonial structures and dynamics" (Fernandes 1979, 13). Herein lies the genesis of Brazilian racial inequalities.

Here too, spatial and temporal dimensions are fundamental to understanding the historical roots of inequality. First, it must be recognized that Brazil was forged from genocide and the violent expropriation of indigenous lands. Even the Jesuit conversion of indigenous peoples was not intended to free them from slavery, but rather to insert them into servitude within the productive systems imposed on the colony. To this day, the country shamelessly tolerates illegal mining and predatory agribusiness on indigenous lands and other forms of ethnocide (Longhini 2023), as well as shady projects such as the Marco Temporal, which aims to restrict indigenous peoples' right to demarcation.[7]

Recognizing past and present inequalities and violence against indigenous peoples as forms of racism is a fundamental task. This similarity with anti-Black racism, however, is not without its particularities – both historical and spatial – both in the forms of colonial violence and in the diversity of cultures, strategies, and

5 See, in the same vein, the works of (Azevedo 1987; Seyferthe 2002; Skidmore 2012, Mattos 2016; Faustino et al. 2023).

6 Even recognizing the differences, the aforementioned phrase coined by Marx to describe Germany was revisited by philosopher José Chasin (2019) to describe Brazilian particularities.

7 See the Manifesto organized by the Articulation of Indigenous Peoples of Brazil (APIB), available at: `https://apiboficial.org/files/2023/09/marcotemporal_cartilha_v10_tela.pdf`.

tactics of struggle throughout these five centuries. Slavery was not uniform throughout the territory colonized by the Portuguese, and anti-slavery struggles such as the countless quilombos, revolts, confederations, escapes, and displacements of indigenous peoples and quilombos[8] must also be understood in their contexts.

For Clóvis Moura (1988), the golden age of slavery – understood by him as "full slavery" – was marked by the total dehumanization of the enslaved and, at the same time, conducive to quilombola uprisings, as was the case with the Republic of Palmares. In the final period of the slave regime – which he called "late slavery" – urban dynamics had already complicated class relations, often introducing the enslaved element into the direct production of the nascent industry or into important positions in the service sector, the quilombola struggles – although they persisted – were combined with associative strategies aimed at purchasing freedom and formally ending slavery. Both racism and struggle influence and are influenced by changes in the dynamics of class struggle.

The economic decline of slavery from the second half of the 19th century onwards – but also the recent memory of a series of radical struggles such as the Haitian Revolution and the Malês Revolt – contributed to the redefinition of racist stereotypes about the black population. On the one hand, the ruling classes – especially in territories where capitalism was more developed, such as southern and southeastern Brazil – feared black and indigenous struggles (Azevedo 1987, Moura 2021), on the other hand, they envisioned a slow, safe, and gradual transition in production relations that would keep economic and symbolic power in their hands.

But to do so, they would have to move even closer to European ideals of society. Thus, Brazil replaced slave labor with free labor, but it would have to be white and Christian (Moura 1988). At the same time, these ruling classes imported racist theories such as social Darwinism, scientific racism, and eugenics to guide the organization not only of what remained backward, but also of what was most developed in the country (Goes 2018, Caires 2025). It is no wonder, therefore, that leading figures in the Brazilian national identity project, such as Nina Rodrigues, Monteiro Lobato, Arnaldo Vieira de Carvalho, and Afrânio Peixoto, found their main inspiration in scientific racism.

The curious thing, however, is that the most progressive critiques of this conservative thinking in the 20th century ended up reinforcing

8 *Quilombos* – also known in other American territories as *Maroons*, *Cimarrones*, or *Palenques* – were warrior communities founded by enslaved people who escaped colonization in Brazil. Thousands of quilombos existed throughout the colonial period, and even today, thousands of these communities persist in their territories, resisting capitalist exploitation.

other mystifying ideologies. The most illustrious case, without a doubt, is Gilberto Freyre's culturalist theory, which refutes the biological premise of race, bringing the reflection into the field of culture, but fails to recognize racism as a founding element of Brazilian sociability; on the contrary, his theory obscures it. However, it is fair to acknowledge that he did not coin the term "racial democracy" and that the notion of a racially harmonious Brazil penetrated so deeply into the national identity that it came to be shared by intellectuals from various theoretical backgrounds.

It is no coincidence that the contemporary Black Movement, created in the late 1970s, has chosen to denounce racism as its main task. A relatively successful task, but one that has not yet been fully accomplished. Decades of studies that highlight racial inequalities in every field in which they are measured are still ignored, both theoretically and politically. In a way, the place of racism in the dynamics of class struggle in Brazil and around the world is still ignored. The result of this ignorance – which is yet another expression of racism – as stated by Clóvis Moura (1988; 1994) is the inability to concretely analyze the specific situation in a country where capitalism was established through colonization and slavery. A reckoning that has yet to be made.

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Racial/Colonial Capitalism in the Epistemology of Social Security Law: Inequality Patterns in Contributory Benefits in Brazil

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Abstract This paper aims to investigate the relationship between Social Security Law's epistemology and the racial/colonial capitalist logic in Brazil. The main objective is to reveal the inequalities caused by colonial patterns on the access and values of contributory benefits for Black workers in Brazil, to demonstrate epistemic racism in Social Security Law. This analysis will be carried out within the framework of Latin American decolonial theory. Methodologically, a qualitative analysis of access criteria and values of contributory benefits is carried out based mainly on data from Brazilian public pension funds to compare social rights of White and Black workers in the General Social Security System. Subsequently, in a propositional stage, decoloniality is used to understand how other temporalities/values can be legally recognized as work by Social Security's epistemology as a way of pluralizing the social protection towards Black workers in Brazil.

Keywords General Social Security System. Contributory Benefits. Coloniality of Power. Black workers. Epistemic Racism. Brasil.

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1 Introduction

This paper aims to investigate the relationship between Social Security Law's epistemology and the racial/colonial capitalist logic in Brazil. The main objective is to reveal the inequalities caused by colonial patterns on the access and values of contributory benefits for Black workers in Brazil, to demonstrate epistemic racism in Social Security Law.

To access retirement in Brazil men must be 65 years old and have 20 years of contributions, and women must be 62 years old and have 15 years of contributions[1] (INSS 2025). Social Security Law presents this scenario as equitable, conveying the fiction of intra-systemic solidarity, ignoring the effects of the coloniality of power on the principle of contributivity.

Hence, this paper theoretical framework is linked to Latin American decolonial theory, discussing markers of geopolitics and race[2] intertwined with legal Social Security epistemology. Coloniality is a power pattern created during the invasion of the Americas in 1492, which is based primarily on the social division of labor according to the phenotypic criterion of race (Dussel 1994; Quijano 2000). This racial division of labor persists in contemporary social relations, even with all the resistance from the working-class (Quijano 2000; Mignolo 2010). Therefore, coloniality goes beyond the formal end of colonialism, even with all the resistance undertaken against this domination (Dussel 1994; Lugones 2008).

For decolonial scholars, capitalism is inherent to this racial/colonial system because it was grounded in accumulation regimes

1 In Brazil, there are two types of public and mandatory pension schemes: the Special Pension System, intended for civil servants, and the General Social Security System intended for all workers who are not civil servants or military (Castro, Lazzari 2025). In this paper, we focus on the latter, which encompasses the largest number of Brazilian workers. Every person who performs 'formal' paid work in Brazil has to contribute to the General Social Security System, because affiliation is compulsory. Affiliation can occur as an employee, domestic worker, casual worker (*avulso*), self-employed worker (*contribuinte individual*), or family agriculture worker (*segurado especial*). As a rule, companies and employers also have to contribute. All these contributions go to a single public fund managed by the National Institute of Social Security (INSS). There is one non-mandatory form of affiliation in the General Social Security System for people who do not perform productive work (*segurado facultativo* – which is mentioned in the text on page 14). However, contributions are also mandatory for them when they decide to join the System.

2 For decolonial authors, the phenotypic criterion for social classification of the population has no known history before 1492 (Quijano 2000).

based on expropriation[3] and exploitation with all historical forms of work – slavery, servitude and waged labor – articulated around capital (Quijano 2000). Thus, decoloniality is a continuous process of anti-colonial struggle that entails detaching epistemically and politically from colonial patterns of power (Grosfoguel 2008; Mignolo 2010).

Considering the decolonial matrix, this paper begins by defining decoloniality as a method to analyze Social Security Law. Next, a qualitative analysis of access to and the values of contributory benefits is carried out mainly based on data from Brazilian public pension funds in order to compare the amounts received by White and Black people.

It stands out how informality is a driving force for keeping Black people in precarious work and how this acts as a historical exclusion from Social Security protection. The concept of informality here is based on two dimensions: i) an external one, which is characterized by the total absence of legal protection of labor relationships and Social Security coverage (ILO 2015); ii) an internal one, which manifests itself within legal recognized labor relationships outside the standard employment relationship, marked by practices of reduction or distortion of labor and Social Security comprehensive coverage, resulting in Law's precarious inclusion, with partial social protections (IBGE 2024).

Subsequently, in a propositional stage, decoloniality is used to understand how other temporalities/values can be legally recognized as work by Social Security's epistemology as a way of pluralizing the social protection towards Black workers in Brazil.

2 Latin American Decolonial Theory

Decoloniality is a method to break from coloniality of power in political and epistemic fields, requiring engagement with subaltern knowledges and practices to pluralize scientific production, including Social Security Law (Quijano 2000; Mignolo 2010). Decolonial scholarship is based on perspectives that emanate from counter-hegemonic knowledges, including those produced by women, Black and Indigenous peoples, who have in modernity been consigned

3 The very essence of expropriation is that it rests on the historic and the ongoing dispossession and appropriation of resources (human or non-human) without any compensation whatsoever, or without compensation that is adequate to replenish those various resources (Zbyszewska, Maximo 2025).

to a subaltern[4] status (Gramsci 1975; Spivak 1988; Zbyszewska, Maximo 2025). Decolonial theory encompasses[5] diverse approaches; this paper will focus on Latin American decolonial theory.

According to the Peruvian Marxist sociologist Aníbal Quijano (2000), the pattern of coloniality of power, which structures the thought of Latin American decolonial theory, imposed a modern paradigm in every social field: i) the collective governance; ii) the concept of family, gender, and sexuality; iii) the social division of labor. iv) knowledge production.

In the field of *collective governance*, the colonizer forged a homogeneous identity, imposing the category of the nation-state through the genocide of Black and Indigenous people in the Americas (Quijano 2000; Grosfoguel 2008). The myth of racial democracy still sustains this system, specially in Brazil, simulating democratic participation, which was first subservient to European countries and, later, to the United States (Gonzalez 1984).

As for the *model of family, gender, and sexuality*, the paradigm imposed was that of the heterosexual, cisgender White family, with a Eurocentric bourgeois ethos, linked to Christianity and patriarchy, axes that constitute the coloniality of gender (Oyèrónké 2004; Lugones 2008).

Colonial patriarchy and phenotypic racial classification shaped the *social division of labor* in Latin America. A racial labor hierarchy confined Indigenous people to servitude and enslaved Black people, while Spanish and Portuguese settlers could work freely, earn wages, and become independent merchants, artisans, or farmers. Only White European men held middle and high-ranking positions in the colonial civil and military administration (Dussel 1994; Quijano 2000). This racialized division of labor was intertwined with gender domination (Gonzalez 1984; Oyèrónké 2004). As María Lugones (2008) argues, the colonial imposition of gender extends beyond the domestic and sexual spheres to public authority and wage labor. Black and Indigenous women not only performed domestic, sexual and care

4 Gramsci (1975) used the term "subaltern class" to refer to people who are excluded from capitalist power. However, other scholars have cautioned against theorizing about a homogeneous subaltern subject, given that race, colonization and gender are also constitutive of subalternity (Spivak 1988).

5 Decolonial theory encompasses:i) Postcolonial studies, concentrated mainly in India and focused on post-structuralist theories (Spivak 1988); ii) Latin American decoloniality, derived from the concept of coloniality of power (Quijano 2000), which also includes Latin American contracolonial concepts, such as *buen vivir* (Acosta 2016); iii) Descolonial theories, which emerged with demands for independence and anti-imperialist movements in Africa and the Caribbean, which permeates Ubuntu philosophy (Ramose 2005; Fanon 2008); iv) Decolonization studies in North America and Oceania, focused on English colonization, centered on insurgent epistemologies (Simpson 2017).

work for White colonizers but were also enslaved into plantations and mining labor (Oyèrónké 2004; Lugones 2008).

Finally, in the axis of *knowledge production*, Eurocentrism prevailed as the only valid form of science. Eurocentrism "does not refer to all the ways of knowing of all Europeans and in all eras, but to a specific rationality that becomes hegemonic worldwide, colonizing and overriding all others […] in Europe and the rest of the world" (Grosfoguel 2008, 117). Considering the intersection between Eurocentrism and racism, the epistemic inferiority of racialized people was a crucial argument, which is called epistemic racism (Gonzalez 1984; Grosfoguel 2016). The Eurocentric narrative of the "lack of intelligence and civility" of Black and Indigenous people imposed the inferiority of the culture, knowledge, and scientific production of racialized people, which Nelson Maldonado-Torres (2008) dominantes coloniality of being. Epistemic racism was the colonial idea that justified the anti-human ontology of Black and Indigenous people, underpinning the racist division of labor in Latin America (Gonzalez 1984; Nascimento 2018).

3 Coloniality and Brazilian Welfare State

Analyzing the pattern of coloniality of power, one can understand the different formations of the Welfare State in the countries of the Global North, based on the processes of exploitation and expropriation of the colonies (Esping-Andersen 1990). Despite the heterogeneity, especially in the capitalist countries of Western Europe, the existence of a Welfare State is observed, marked by the expansion of distributive policies, such as social rights (like education, labor rights, and social security) (Antunes 1995; Batista 2017).

In Brazil, considering the violent process of colonization, this construction occurred in a completely different way, as it did in most countries of the Global South. In a neo-extractivism pact, even under progressive democratic governments, the majority of the working-class remained excluded from the protected employment relationship, the key to accessing social rights (Svampa 2015).

Accordingly, Social Security Law granted central visibility to one form of exploitation: the standard employment relationship. With this, Eurocentric labor sociality became the "world's typical work" (Muradas, Pereira 2018). The axes of coloniality of power are embedded in Social Security Law's epistemology, which centers on the "typical" modern Eurocentric employment relationship, creating a deliberate gap between legal theory and the realities of the Global South's working-class, especially women and racialized people (Muradas, Pereira 2018).

Therefore, the advancement of contributory social security rights was destined mainly to the White people who, from colonization, are the epistemic subject of the employment relationship (Muradas, Pereira 2018; Corraide 2022). In Brazilian peripheral areas, whether rural or urban, usually occupied by racialized workers, the Welfare State paradigm has never arrived (Pochmann 2007; Harvey 2012; Gomes 2021), so this gap is filled by parallel drug trafficking states and currently by evangelical churches (Spyer 2020). Only the non-contributory portion of social rights reaches these locations, such public health clinics and Social Assistance Reference Centers (CRAS), but most of them are far more precarious than those in affluent areas (Bomfim 2022).

This makes clear the capitalist state's dirigism and its attempt to maintain coloniality, including through Whitening policies in social rights (Gomes 2021). Coloniality manifests itself in neoliberal-racist epistemic choices regarding legal protection: White people, despite being a minority, control the executive, judicial, and legislative branches and large corporations in Brazil, guaranteeing rights for themselves (Gonzalez 1984). Juridical colonial institutions have ensured, since the beginning of modernity, the maintenance of racialized subaltern subjects (Muradas, Pereira 2018). Recognition of social rights are only fulfilled when they are operationalized within this state capitalist/colonial racial logic and, consequently, conceding legal crumbs aimed at pacifying social sectors (Batista 2017).

There is in Brazil a racial pattern of juridical intelligibility that, since the colonization, determines who is the epistemic subject of Social Security Law and, therefore, who will be protected or excluded from contributory social security rights (Muradas, Pereira 2018; Bomfim 2022). This is done based on a White standard of humanity derived from a capitalist racial (and sexual) division of labor established with the European invasion (Quijano 2000; Lugones 2008), as the data on informality, work and Social Security will demonstrate below.

4 The Black Division of Labor Market and Social Security

The maintenance of the colonial pattern of racial inequality can be observed through the distribution of different law protections and labor opportunities among Black and White people. For this paper, job occupation and levels of informality are established as parameters to prove the correlation between the racial phenotypic division of labor linked to Brazilian Social Security.

Brazilian Law n. 12.288/2010 (Racial Equality Statute) the Black category (*negros*) encompasses Black (*pretos*) and Brown and Mixed-Raced people (*pardos*). According to data from Brazilian

Institute of Geography and Statistics (Instituto Brasileiro de Geografia e Estatística 2024), 40.9% of the Brazilian population is working in informality. In this informal economy, the Black population, in 2023, represented 45.8% of workers, while White people occupied 34.3% of these jobs. The rate of Black workers in the informality is higher when compared to other years maintaining colonial patterns[6] (IBGE 2022). On average, out of every ten Black people of working age, more than four have no type of coverage of retirement or pension (INESC 2017).

In 2023, it is noteworthy that the rate of underemployment[7] among Black people represented 21.3%, while among White people, it was 13.5% (IBGE 2024). The same survey shows that the wages received by Black people in all occupations are lower than those of White people, and there are fewer Black people in leadership positions (IBGE 2024). Black workers are more than 60% of workers in sectors linked to agriculture, construction, and domestic services and these activities have lower incomes (IBGE 2024).

Based on these data, a statement can be made regarding Social Security. When monthly wages are lower due to precarious and low skill work, the Social Security benefits that Black population will obtain in events such as accidents, disability, death, disease, and age will also have negligible values (Lima, Silva 2020; Oliveira, Dutra, Junior Santos 2023). This is due to the contributory nature of part of Brazilian Social Security, in which benefits linked to social risks depend on the amount of contributions and consistency over time – translated into two legal institutions: the contribution time and the waiting period[8] (Castro, Lazzari 2025). These data show that race is a variable that explains Social Security inequalities related to the labor market in Brazil, because when the remuneration of a

6 The data available from Social Security Yearbooks does not differentiate between Black national and migrant workers. However, the percentage of migrants in the "formal" Brazilian labor market is low. Data from the Ministry of Justice (2024) shows that only about 203,473 thousand migrants were in "formal" labor relations out of a total of 102.4 million people in Brazil.

7 This index is calculated by adding together three components: unemployment, underemployment due to insufficient hours, and the potential labor force (which includes people who are not employed but were available for work or did not seek work despite wishing to be available for work (IBGE 2024).

8 The benefits offered by the General Social Security System are: i) survivor's pension; ii) permanent incapacity retirement; iii) retirement by age and time of contribution; iv) special retirement, for those who work in conditions harmful to health; v) imprisonment allowance, for the family of a low-income insured person who is imprisoned; vi) family allowance, for low-income families with children under 14 years of age; vii) temporary incapacity allowance; viii) accident allowance, for people who return to work with injuries and are undergoing rehabilitation. Each benefit has specific requirements, but the general requirements for accessing benefits are only these two. The waiting period is the minimum period of monthly contributions required to be eligible for Social Security benefits (Brasil 1991).

Black worker is below or only a minimum wage[9] necessary expenses are concentrated on subsistence and not on benefits contributions.

Even though race is a determining factor, the Social Security Statistical Yearbook (Anuário de Estatístico de Previdência Social), a document produced by the Brazilian Ministry of Social Security, does not include in its periodic data any differentiation of Social Security benefits between Black and White people. There was no field or requirement for recording "race" in the National Social Security Institute (INSS) forms until 2002 (INESC 2017). This itself is a racial structural erasure in the process of public policy-making. There appears to be an attempt to avoid a racial-redistributive justice due to the absence of this data.

5 Epistemic Racism in General Social Security System

Therefore, we turn to the analysis carried out by published research to demonstrate other dimensions of epistemic racism in the Brazilian General Social Security System. First, It should be noted that access to minimum Social Security benefits cannot be considered as an accessory element within an unequal society such as Brazil (Silva 2017). This makes retirements and pensions an instrument of maintenance for working-class families, who often rely on low Social Security benefits for their livelihood, forcing elderly workers to continue working just to survive (Silva 2017). Around 70% of benefits paid by the National Social Security Institute in Brazil correspond to only one minimum wage (IPEA 2024).

However, there is a clear discrepancy in the degree of dependence on this source of income for Black and White people: 72.7% of the income of elderly Black people is made up of these benefits, while this percentage is 64.8% for White people (Zorzin 2008). Black people depend more on Social Security income because their income from work and income from rent, allowances and donations is much lower than that of White people, which implies a smaller share of total income for the latter (Zorzin 2008). Furthermore, the average value of benefits received by elderly Black people corresponds to only about 63% of the value received by White people (Zorzin 2008).

In 2019, a Social Security reform took place, through Constitutional Amendment n. 103, which reinforced the notion of individuality over solidarity by establishing austerity measures such as: i) more rigorous calculations for granting benefits; ii) a minimum age for all retirements, with the elimination of voluntary retirement based on

9 The minimum wage in Brazil is 1518 reais per month, which is equivalent to about 273 dollars per month.

contribution time; iii) impoverishment of working-class families due to the inability to accumulate retirement and pension benefits in their entirety (Castro, Lazzari 2025).

This is a reform that harms the entire working-class, but it is even worse for those on the margins of society (Lima, Silva 2020; Oliveira, Dutra, Junior Santos 2023), as it requires more time working and contributing to the system in order to access lower benefits in older age, increasing pre-existing intersectional inequalities derived from colonization (Lima, Silva 2020).

Marcio Pochmann (2007) states that general access to Social Security has expanded in terms of the overall number of benefits granted (retirement and pensions) but without addressing social exclusions of gender and race as structural elements. Data from the Social Security Statistical Yearbook (Anuário Estatístico de Previdência Social) between 2009 and 2024 prove this logic. In 2009, 4.5 million social security benefits were granted. In 2024, that number reached 6.9 million, with a steady increase in benefits granted since 2020 (INSS 2025). However, the Black population, especially Black women, remain vulnerable. In 2022, more than a fifth (21.2%) of employed Black women were unable to contribute to Social Security, while only 6.8% of White men were in this situation (IPEA 2024). The situation worsened for Black women during the last years. In 2016, 19.2% of them were unprotected by Social Security and lacked the ability to contribute (IPEA 2024).

Therefore, there is a racial positional precariousness derived from coloniality in Brazilian Social Security Law that can be listed: i) there is a greater barrier to Social Security affiliation related to race, which is linked to the racial division of labor of the colonial past; ii) with the neoliberal reforms, there is an intensification of internal and external informality for Black workers, generating jobs that tend to lack social protection, as Brazilian Social Security is contributory; iii) in the realm of internal informality, Black workers occupy lower-paying jobs, which, in the long term, guarantee social security benefits that are linked to the minimum wage or very close to it.

Given this Brazilian reality, stemming from the coloniality of power, it becomes relevant to consider pluralizing social protection for Black people, challenging epistemic racism in Social Security Law epistemology with regard to the principle of contributive benefits.

6 Pluralizing Social Protection for Black people

Thinking about going beyond a merely rights-claiming policy, to develop legal paradigms beyond the racial/colonial capitalist system, it is important to consider multiple conceptions of time, value, and therefore, work inspired by decolonial studies.

In the cosmology that underlies the Western understanding of value, water, animals, land and anticapitalist labor are placed on a lower hierarchical scale than market value (Krenak 2019; Herzog, Pereira 2025). In contrast, in other cosmologies – such as the idea of *Buen Vivir*, which includes the *sumak kawsay* in Ecuador, *suma qamaña* in Bolivia, or *teko porã* in Brazil – such living beings, communitarian labor and a sense of belonging to the land are not reducible to economic resources but have a higher value (Krenak 2019; Herzog, Pereira 2025). Inspired by these ways of thinking, in Ecuador and Bolivia, Nature was constitutionally recognized as a subject of rights (Herzog, Pereira 2025).

This biocentric stance is "based on an alternative ethical perspective, accepting that the environment – all ecosystems and living beings – has an intrinsic, ontological value, even when it has no use for humans" (Acosta 2016, 27). Some South American Indigenous and Quiolombola's[10] time conceptions focus on the time of nature, with its own circularity, without a separate notion between past, present and future (Nascimento 2018; Munduruku 2020). As decolonial feminists have always pointed out, temporalities are multiple, challenging the linearity of time set in the Eurocentric patriarchal-industrial capitalism, which reduced the measurement of various temporal layers to the legal institute of working hours (Perez-Orozco 2019).

Such ways of understanding and organizing life in society are not new, not homogeneous, and not free from hierarchies (Nascimento 2018; Herzog, Pereira 2025). But the point is that such non-market societies are not "primitive", as coloniality taught us – and they might, despite all imperfections, be better in line with social justice than many Western forms of governance (Herzog, Pereira 2025).

Considering these counter-hegemonic concepts of time and value, the question arises: how can Social Security Law recognize these decolonial perspectives on labor? Among several examples, we list two that can be considered as decolonial instruments of strategic essentialism, which means occupy hegemonic categories within the system itself, with the political intention of undermining its power structures (Spivak 1988): i) intersectional female reproductive work; ii) racialized ontological labor.

One of the main concerns of feminists, including the decolonial ones, is understanding how to recognize the value of reproductive work, which includes the biological and practical reproduction of life

10 *Quilombos* are territories protected by the Brazilian Constitution because these Black communities resisted colonial violence and have maintained ancestral ways of life. *Quilombismo* is a Black scientific project that confronted and continues to confront Eurocentrism and the capitalist racial division of labor (Nascimento 2018).

in daily routines, e.g., the provision of meals for family members, the cleaning of living spaces, but also the emotional and physical care for children, the elderly, or the ill (Federici 2012; Herzog, Pereira 2025). These feminist critics agree that reproductive work, mainly performed by women, sustains all life, rather than being primarily an input into the "productive economy" (Zbyszewska, Maximo 2025). However, in a capitalist patriarchal society, reproductive work continues to be economically and socially undervalued, maintaining the White patriarchy (Davis 1981; Herzog, Pereira 2025).

Considering the intersection of class, gender, and race, when White women, from the middle and upper classes, manage to leave the household, there is often a delegation of domestic and care work to other women. These are often poorer, racialized women, from Global South countries, as Black, Latin, and Asian feminists have highlighted (Davis 1981; Gonzalez 1984, Chow 1992). In Brazil 93.9% of paid domestic and/or care work were women. Black women make up around 70% of them (IPEA 2025). From January 2017 to August 2023, 101 Black domestic workers were rescued from conditions analogous to slavery (INESC 2017). These numbers are extremely underreported, due to the difficulty of labor inspection at private homes.

One of the ways reproductive work is legally recognized is through inclusion of mothering labor for contribution time purposes. From a decolonial perspective, this could be a form of strategic essentialism, as it pluralizes the conception of time and value, and therefore of work, within the epistemology of Social Security Law, which only considers as contribution time the mercantile value extracted from the exploitation of formal productive labor (Lenzi 2021; Bomfim 2022).

Countries like Argentina and Uruguay have already adopted laws in this regard. In Argentina, according to Decree 475 of July 19, 2021, women and pregnant individuals may accrue 1 year of contribution time for each child born alive; in the case of adoption of minors, the adoptive person will accrue 2 years of contribution time for each adopted child; and 1 additional year of contribution time for each child with a disability, who was born alive or adopted as a minor. Individuals who have benefited from the Universal Child Allowance for Social Protection (an Argentinian program for low-income families) will have 2 additional years of contribution time added for each child (Argentina 2021).

In Uruguay, according to Law n. 18.395/2008 (foot note not in references), mothers receive an additional year of contribution time for each child born or adopted. This increase is limited to a total of 5 years (Uruguay 2008). In both countries, retirement requires 60 years of age and 30 years of contribution time: time spent caring for children can help reach those 30 years (Uruguay 2008; Argentina 2021)

Obviously, these are still minimal legal recognitions of contribution time that exclude other types of reproductive work that do not

include motherhood (Collins 2000; Vieira 2018). Furthermore, this assumes that the remaining contribution time for benefits purposes is obtained through formal productive work (Collins 2000; Vieira 2018). However, we emphasize that, unlike legal protection under Social Assistance, here there is a conversion of the social/economical value of care work into the market value recognized as contribution time by Social Security Law, which generates a small shift in an epistemology intertwined with racial/colonial capitalism (Bomfim 2022; Herzog, Pereira 2025).

In Brazil, despite existing legislative bills to recognize maternal care labor as time contributing to social security benefits, such as bill 2647/2021, the current system does not provide any legal recognition of reproductive work (Vieira 2018; Lenzi 2021). The figure of the voluntary insured (*segurado facultativo*), used by most housewives with children, still requires monetary contributions to reach the minimum time for retirement purposes (Batista 2017; Lenzi 2021). In this sense, the racist patriarchy of capitalism is maintained, because women need to rely on their husbands to contribute to Social Security, and when they are unable to do so, the Social Assistance system ends up being overburdened (Lenzi 2021; Bomfim 2022).

A great example of a Brazilian social assistance benefit that legally recognizes reproductive work is "Bolsa Família", which is a conditional income transfer program that benefits families living in poverty and extreme poverty – per capita income of up to 218 reais per month, approximately 30 dollars per month – that has drastically reduced hunger and social inequality in the country, encouraging the formalization of work (Santos et al. 2017).

However, despite providing political visibility and being important instruments for reducing intersectional inequalities, using Social Assistance benefits to recognize reproductive work does not alter the racial/colonial capitalist patterns on Social Security Law's epistemology in terms of time, value, and therefore, the legal category of work (Muradas, Pereira 2018; Bomfim 2022). Associated with the strategies of conditional and universal basic incomes (provided for in Brazil by Law 10.835/2024, which was never implemented), it is necessary to rethink the very legal categories that underpin the centrality of White productive-formal work in Social Security Law, which maintains the structure of colonial power in Brazil (Bomfim 2022).

Just like intersectional female reproductive labor, racialized ontological labor remains invisible in Brazilian Social Security Law. According to Sara Ahmed (2012), ontological labor consists of invisible work carried out by Black people that unfolds in two aspects. The first manifests itself in confronting daily violence in order to remain in institutions that are historically naturalized as White. This ontological labor develops within the realm of being, insofar as Black people do not feel they belong in that place, which

can result in mental illness, suicide, devaluation of work, moral and sexual harassment, discrimination, silencing, theft of speech, among other forms of daily micro-violence (Ahmed 2012; Corraide 2022). The second aspect concerns the work of Black people in acquiring know-how to develop survival strategies in White institutions. Such strategies involve the stripping away of cultural and religious symbols, the imposition of clothing, haircuts and the mimicking of language (Ahmed 2012; Corraide 2022).

Ontological labor for Blackness represents the energy, time, and suffering resulting from the struggle to simply exist as a person within White institutions. As long as Blackness remains attached from the zoomorphization of the coloniality of being, which justified slavery in the Americas, its inhumanity persists (Maldonado-Torres 2007; Corraide 2022).

A legal-social security proposition would be the recognition of ontological labor as contribution time for retirement purposes, just as motherhood has been recognized in some Latin American countries. As has been demonstrated, due to the racial division of labor established during colonization, informality in Brazil is occupied by racialized workers. In this sense, a decolonial proposal would be an affirmative action[11] in the Social Security System recognizing this work, made invisible by coloniality, performed exclusively by racialized people in Brazil, especially Black and Indigenous people.

These two examples of decolonial instruments of strategic essentialism in Brazilian Social Security Law have a number of limitations, insofar as, despite generating small shifts in the legal coloniality of epistemology, they still maintain the racial/colonial capitalist system and are assimilated by it. However, decoloniality is a process. A process of struggle to involve subaltern voices in the creation of a new epistemology of Social Security Law. Therefore, mapping these small shifts that seek to pluralize the capitalist/racist concept of work, derived from the coloniality of power, is crucial for seeking other imaginaries for Social Security Law.

7 Conclusion

In this paper, we attempt to demonstrate the epistemic racism that stems from the coloniality of power embedded in the legal categories of Brazilian Social Security Law. More than demonstrating racial

11 Affirmative actions policies based on self-declaration of race are already used for the admission of Black and Indigenous people to public universities in Brazil, under Law 12.711 of August 29, 2012. Even with some problems related to fraud/oversight, these instruments are altering academic knowledge production and the racial composition of power spaces (Lima, Campos 2021).

and class inequalities, this brief study aimed to show that the very ontology of the subject of rights protected by Social Security Law in Brazil is based on a cosmology of the capitalist racial/colonial system.

By recognizing Eurocentric sociability as central to its epistemology, and protecting only capitalist labor within the employment relationship, Brazilian Social Security Law maintains the colonial power project of excluding Black workers from legal protection. Epistemic racism impacts access to and the value of contributory social security benefits, creating a fracture between the theory of Social Security Law and the reality of the Brazilian working-class, which has always been predominantly Black, despite state attempts to whiten it or erase its history of struggle.

Thinking about other ethics of life through decolonial lenses can be an opportunity to rethink the very foundations of the categories of Social Security Law, such as the legal concept of time, value, and work. This epistemic shift aims to alter the ontology of the subject of social rights, to expand the legal protection of other forms of work – unproductive, reproductive, or ontological – performed throughout history by racialized workers.

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The Volkswagen Case in the Amazon: Structural Inequality, Contemporary Slavery, Human Trafficking, and Corporate Relations with the Brazilian Military Dictatorship

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Abstract The article analyzes the Volkswagen case in the Amazon to reflect on the context of contemporary slave labor and structural inequality in Brazil. Based on a study of the economic policy of the Brazilian military dictatorship and Volkswagen's business relations with the regime, it investigates the legal proceedings that recognized the company's responsibility for subjecting workers to contemporary slavery and human trafficking, with the declaration of the imprescriptibility of serious human rights violations.

Keywords Structural inequality. Contemporary slave labor. Human trafficking. Amazon. Brazilian military dictatorship.

Summary 1 Introduction. – 2 The Economic Policy of the Military Dictatorship, Volkswagen Brazil, and the Vale do Rio Cristalino Farm: Explaining the Context. – 3 Contemporary Slave Labor and Human Trafficking at the Vale do Rio Cristalino Farm. – 4 The Legal Process: The Non-Applicability of Statutes of Limitations to Contemporary Slavery and the Responsibility of Volkswagen Brazil. – 5 Final Considerations.

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1 Introduction

On August 29, 2025, Brazil's press reported: "Volkswagen is fined R$ 165 million for slave labor during the dictatorship" (Repórter Brasil 2025).

On September 15, 2025, in Germany: the Federation of Critical Shareholders and Brazilian Initiative Freiburg e.V. issued an open letter to the members of Volkswagen's Board of Management and Supervisory Board stating: "Urteilsspruch in Brasilien muss angenommen werden" (the sentence in Brazil must be accepted) (Dachverband der Kritischen Aktionärinnen 2025).

On August 29, 2025, labor judge Otávio Bruno da Silva Ferreira of the Labor Court of Redenção, of the Regional Labor Court of the 8th Region (RLC-8), in a public civil action filed by the Public Ministry of Labor (PML), ordered Volkswagen do Brasil Indústria de Veículos Automotores Ltda. (Volkswagen Brasil) to pay R$165 million for collective moral damages, following a public civil action filed by the Public Ministry of Labor (PML). The ruling was based on evidence establishing that workers were subjected to contemporary slave labor and human trafficking at the Vale do Rio Cristalino Farm (referred to as the Volkswagen Farm), located in Santana do Araguaia, in southeastern Pará, during the Brazilian military dictatorship. On November 27, 2025, new individual lawsuits were filed.

Investigations revealed that between 1974 and 1986, hundreds of workers at the Volkswagen Farm were subjected to contemporary slavery, facing degrading working conditions, precarious and unsanitary housing, lack of access to drinking water and medical care, exhausting working hours, armed surveillance and restriction of freedom, and debt slavery, in which workers were lured and kept under financial and physical control, in addition to reports of abandonment of sick people and possible murders. Workers for temporary activities were recruited by intermediaries in various states of the country, notably the states of Goiás, Mato Grosso, Tocantins, and Pará, and taken to the farm to cut down the forest, build fences and firebreaks for protection, prepare the land for cattle breeding, and work in construction. Upon arrival, they were forced into debt bondage by having to buy kitchen utensils, tarpaulins (tarps) for building shelters, and food at exorbitant prices in shacks controlled by the company itself. If they tried to leave, they would need written authorization, which was kept by the guards at the farm's gatehouse.

The Vale do Rio Cristalino Farm was acquired by Volkswagen do Brasil through its subsidiary Companhia Vale do Rio Cristalino Agropecuária Comércio e Indústria (CVRC) established in 1973. The property covered 139,000 hectares and was used for livestock farming and timber extraction, both for the foreign market. The project

received financing and incentives from the Amazon Development Authority (Sudam) and Banco da Amazônia, as part of the military regime's policy of occupation of the Amazon.

The Volkswagen Case is part of the military government's broader efforts to implement projects in the Brazilian Amazon region, which accounts for approximately 60% of the country's territory. Based on the political and economic discourse of integrating the region into the country's productive centers, the government created tax and financial incentives policies for domestic and foreign businesses to invest in the region. However, on the other hand, this policy resulted in: the violation of labor legislation, contemporary slave labor, the privatization and concentration of public lands, and violence against squatters, both old and new, riverine and indigenous peoples, in addition to environmental degradation resulting from uncontrolled land use.

In this scenario, violence in rural areas and contemporary slave labor are also results of structural inequality in Brazilian society. Since the colonial period, Brazil has experienced an inequitable distribution of property, perpetuated nowadays, with agrarian conflicts that endanger the lives of the most vulnerable populations (Carvalho 2023, 2). This scenario is part of everyday life in Latin American countries that have monoculture farming, mining, and extractive practices through slave labor as chapters in the history of their colonization (Held, Botelho 2020).

This article aims to analyze the Volkswagen case to reflect on the context of contemporary slave labor and structural inequality in Brazil. To achieve this general objective, we investigate the economic policy of the Brazilian military dictatorship and its impact on the deepening of inequalities, followed by the legal proceedings that recognized Volkswagen's responsibility for subjecting workers to contemporary slavery and human trafficking.

In terms of methodology, this is a qualitative bibliographic and documentary study. The bibliographic research draws on previously analyzed works in the field of study, while the documentary research involves materials that have not yet been analyzed, such as the legal proceedings, which will be addressed based on the theoretical framework that allows for the interpretation of the information contained in the official documentation.

2 The Economic Policy of the Military Dictatorship, Volkswagen Brazil, and the Vale do Rio Cristalino Farm: Explaining the Context

In December 2014, the National Truth Commission (NTC)[1] published a detailed report on its activities, informing Brazilian society about the serious human rights violations and political murders committed during the military dictatorship (1964-1985). In this report, the NTC dedicated a chapter to civilians who collaborated with the dictatorship, demonstrating that the final arrangements for the coup involved the participation of foreign and domestic industrialists of varying sizes (Brazil 2014, 321). Among the various companies, the report pointed out that Volkswagen Brazil, at its factory in São Paulo in southeastern Brazil, actively collaborated with the regime's political police and persecuted company workers who were union activists.

In 2015, based on a complaint filed by the Workers' Forum for Truth, Justice, and Reparation, the Federal Public Prosecutor's Office (FPP) and the São Paulo Public Prosecutor's Office (SPPP) launched investigations into Volkswagen Brazil's collaboration with the dictatorship. Subsequently, the Labor Public Prosecutor's Office (LPP) also began investigating the case. The investigations by the Brazilian Public Prosecutor's Office were compiled in the report "Human Rights, Companies, and Transitional Justice: The Role of Volkswagen Brazil in Political Repression during the Military Dictatorship", published in October 2020. The report showed how Volkswagen Brazil collaborated with the military government in repressing critics of the regime, assisting in the repression of political dissent and labor organization.

At the same time, Volkswagen's Integrity and Legal Department launched an investigation in 2016, resulting in the report "VW Brazil during the Brazilian military dictatorship 1964-85: a historical approach", prepared by researcher Christopher Kopper. The study analyzes the relationship between the management of Volkswagen Brazil and its German headquarters with the political leadership during the dictatorship, economic interests, colonialist ideology, and political stereotypes that were decisive in determining the company's attitude toward the regime, as well as the company's participation in political repression and its economic development during the period.

The studies concluded that the political and economic situation in Brazil during the dictatorship was highly favorable to Volkswagen Brazil's business, which benefited from various tax, exchange rate, and

1 The National Truth Commission was created by Law No. 12,528/2011 and established on May 16, 2012. The Commission's purpose was to investigate serious human rights violations that occurred in Brazil between September 18, 1946, and October 5, 1988.

credit incentives, as well as the economic advantages of production costs resulting from the suspension of labor rights, wage control, and unions by the government, which reduced wages to a much lower level than in a pluralistic democracy with free wage bargaining and the right to strike (Brazil 2020). According to Christopher Kopper, a historian commissioned by Volkswagen:

> The military coup of 1964 and the establishment of an increasingly repressive military dictatorship were viewed positively by the company, as it meant a more stable and business-friendly policy. Although the management of VW AG, as we can conclude from reliable German media coverage, was aware of the political and social repression during the military dictatorship, it accepted and downplayed this situation as inevitable from a colonialist point of view. (Kooper 2017, 130)

In addition to benefiting from the dictatorial policy, Volkswagen, "by decision of its senior management in Brazil and with the connivance of its headquarters in Germany" (Brazil 2020, 58), actively collaborated with the government's political police through the company's industrial security sector, "even though it was aware that this cooperation endangered the physical and moral integrity of these workers, including through the use of torture" (8). According to the report produced by the Brazilian Public Prosecutor's Office: this cooperation included informing on and handing over employees to the police, contributing materially to illegal arrests, and collaborating in the forced disappearance, albeit temporary, of its workers by falsifying the truth about their arrest to their families (Brazil 2020).

This association between Volkswagen Brazil and the Brazilian dictatorial regime contributed to serious human rights violations committed during that period, which were recognized by the Inter-American Court of Human Rights (IACHR) as crimes against humanity. In the Gomes Lund (Inter-American Court of Human Rights 2010) and Herzog (Inter-American Court of Human Rights 2018) cases, the Court concluded that serious human rights violations occurred in a widespread and systematic context of attacks by the State against the civilian population, affecting men, women, children, adolescents, and the elderly from a wide range of social groups, such as urban workers, peasants, students, and clergy, through illegal and arbitrary detentions, torture, executions, forced disappearances, and the concealment of corpses by state agents.

The establishment of the regime of exception was accompanied by a political-economic project that involved not only the continuous growth of industry, but also the agricultural exploitation of the cerrado and tropical forests in northern Brazil, as a political action aimed at replacing the agrarian reform that had not yet been

carried out, thus guaranteeing the interests of the agrarian elites (Kooper 2017, 111) and the economic and political groups close to the dictatorial government. Therefore, the military government established a broader program of colonization of the Amazon, with an emphasis on the application of national and foreign capital based on state incentives. Historian Pere Petit divides this period into three phases:

> The economic policy of the Federal Administration in the Legal Amazon, from the creation of Sudam until the end of the Military Regime (1985), can be divided into three different phases, although all of them were fueled by the idea of the Amazon as an empty territory to be occupied. The first was marked by a change in tax incentive policy […] In the second phase, between 1970 and 1974, during the presidency of General Garrastazu Médici, priority was given to colonization projects in the Transamazon region, energy projects, and the expansion of the road network […] In the third phase, beginning in the mid-1970s, the federal government, replacing the ECLAC model that inspired the practices of SPVEA and part of those developed in the early years of SUDAM, oriented its economic intervention based on the comparative advantages that the Amazon had in relation to other regions of the country, in order to contribute to national economic development […] during Ernesto Geisel's term as president (1974-1979), the economic specialization to which the different intra-regional areas of the Brazilian Amazon would be assigned was clearly defined, giving priority to increasing land concentration and, above all, to investments aimed at creating the infrastructure required by mining and metallurgical projects, in addition to choosing the areas or municipalities of the Legal Amazon that would be of special interest to the Agricultural and Agromineral Hubs Program (Polamazônia). (Petit 2003, 81-2)

Joanoni Neto and Guimarães Neto (2019) explain that these investments, primarily directed at agricultural and mining projects, had economic, social, and cultural impacts that disrupted the lives of indigenous peoples, riverine communities, squatters, rubber tappers, artisanal fishermen, and quilombolas, in addition to causing environmental degradation, given the immense areas of land deforested for the projects.

These development plans for the Amazon, established by government policies in conjunction with industrial and financial capital, aimed at integrating the various regions of Brazil, which resulted not only in greater restrictions on rural workers' access to land, but also increased the expropriation of small landowners and

the removal of indigenous peoples and traditional communities from their territories (Joanoni Neto; Guimarães Neto 2019).

Among the various foreign companies that invested in the Amazon region, Volkswagen Brazil, at the time the leader in the Brazilian automobile market, through its subsidiary CVRC, acquired the Vale do Rio Cristalino Farm in Santana do Araguaia, Pará, with financing and tax incentives from Sudam and Banco da Amazônia. When acquiring the farm, Volkswagen's management believed that the legal incentives would be taken advantage of, that half of the land could be deforested and turned into pastures, with the promise of being a model farm geared towards international competition in a project that covered the entire beef production and marketing chain (Acker 2014, 17-18).

Acker (2014, 19) states that Sudam and Volkswagen conceived the farm as a hub for the development of technology and knowledge from industrialized countries, using ultra-modern technical standards and extreme scientific rigor to monitor the herd, supervised by renowned scientists from the Swiss Federal Institute of Technology in Zurich (Switzerland) and the University of Georgia (USA).

In advertising documents from that time, Volkswagen publicized the social impact of the project and "frequently insisted that it had rescued these people from a precarious nomadic life marked by poverty" (Acker 2014, 19). At the Rio Cristalino Farm, the management of Volkswagen Brazil built a model colony in the center of the property for the 300 permanent employees, consisting of houses with electricity and water, community facilities such as a primary school for grades 1 to 4, a food cooperative, a community room with a stage, and a health clinic, with continuous monitoring of workers, especially the control of alcoholic beverages, in a model of authoritarian paternalism typical of the company at the time.

> For VW, the school was an important contribution to the process of "keeping people on the farm, where they receive a good salary, modern and functional accommodation, and an excellent social structure." Employees lived in small individual or family houses equipped with electricity and running water. They had schedules and leisure spaces—a soccer field, a bar, a dance hall, movie theaters, and swimming pools, among other amenities—as well as free medical and dental services. VW publications emphasized that all these social principles had been imported from the social welfare policy already in place at its German factories. (Acker 2014, 19-20)

Figures 1-2 Images taken by the parliamentary delegation that visited the Volkswagen Farm in 1983 show the wooden houses of permanent workers and evidence of deforestation in the area. Source: Personal archives of Expedito Soares and Ricardo Rezende Figueira

The farm then became a model for the military government's propaganda campaign promoting its project to "modernize" the Amazon region through capital-intensive agribusiness and land concentration as the only efficient way to occupy the Amazon. However, the accelerated exploitation of natural resources with the transformation of the forest into pasture, considered a sign of progress and touted by Volkswagen in the press, became the most emblematic case of environmental degradation of the period, dubbed by various groups as the "most anti-ecological project in the world" (Acker 2014, 21-2).

> Five months later, a NASA (National Aeronautics and Space Administration) satellite detected a continuous fire in the southeastern Amazon in an area of approximately 25,000 km², located at the intersection of several cattle farms. VW had not burned the entire areaout—only 9,383 hectares were located on the German company's property. But rumors about the satellite photo spread among the Amazon research community.

The fire at the Volkswagen Farm was debated in the Brazilian public sphere and internationally, reported by various foreign media outlets, and discussed in the German and European parliaments. Associated with the environmental controversy, allegations arose that migrant workers who had informal employment relationships with the Volkswagen Farm had a completely different reality from that experienced by workers with permanent contracts. Hired by intermediaries, these workers became victims of contemporary slave labor and human trafficking, suffering threats, violence, armed surveillance, debt bondage, exhausting working hours, and degrading working conditions.

3 Contemporary Slave Labor and Human Trafficking at the Vale do Rio Cristalino Farm

The investigations conducted within the scope of the legal proceedings proved the existence of slave labor and human trafficking at the Vale do Rio Cristalino farm between 1974 and 1986. The case was built on a range of evidence, such as a dossier from the Pastoral Land Commission (PLC), testimony from victims, family members, and witnesses, newspaper articles and parliamentary debates, reports from visits and interviews with CVRC directors, police investigations, the results of an on-site inspection by a commission composed of parliamentarians, journalists, union representatives, and a religious leader, and testimony collected by the LPP itself.

According to the aforementioned information, there were approximately 300 direct employees at the Volkswagen Farm. However, the services of clearing the forest and forming pasture were performed by workers recruited by contractors, known as "gatos" (cats), without formal employment contracts. Reports even pointed to the sale of workers between contractors. The "gatos" recruited workers from impoverished villages in various states of the country – particularly Goiás, Mato Grosso, Tocantins, and Pará – with the promise of good wages and decent conditions. In the light of these circumstances, the Labor Court concluded that the recruitment of rural workers to provide services in remote locations constituted human trafficking (Brazil 2025, 90).

The workers were then transported in open trucks under armed guard. Upon arriving at the farm, they found working conditions that were completely different from what had been promised at the time of hiring. The workers were subjected to continuous surveillance and control, with armed security guards, searches, and a ban on carrying alcoholic beverages. Moreover, they were denied access to the headquarters' infrastructure – such as the school, health care, and leisure facilities – which were restricted to directors and direct employees.

During a parliamentary delegation visit in 1983 to investigate allegations of modern slavery, a worker was caught by the contractor, who was taking the man back to work at the farm in chains.

Figure 3 On the farm road, the parliamentary delegation found a worker was caught by the contractor, who was taking the man back to work at the farm in chains. Source: Personal archives of Expedito Soares and Ricardo Rezende Figueira

Working conditions on the farm met the criteria for the multiple forms of contemporary slave labor provided for in Brazilian law: debt bondage, exhausting working hours, degrading working conditions, and restriction of freedom and use of violence. Debt bondage occurred on the work fronts, 80 km away from the farm headquarters, where workers were forced to buy products at canteens controlled by contractors, at abusive prices. Debts included transportation, tarps to cover shacks, food, tools, and medicine. In the end, workers were told that there was nothing to pay; it was the "truck system".

The exhausting workdays and degrading conditions were characterized by uninterrupted work, including weekends and holidays, without proper food or rest. In addition, the housing provided to workers was in precarious shacks without bathrooms. The workers consumed unsafe water and were exposed to venomous animals and malaria, a disease endemic to the Amazon region. They did not receive personal protective equipment, and they would not receive medical assistance in the event of serious accidents. Furthermore, any medicines provided were debited from a ledger.

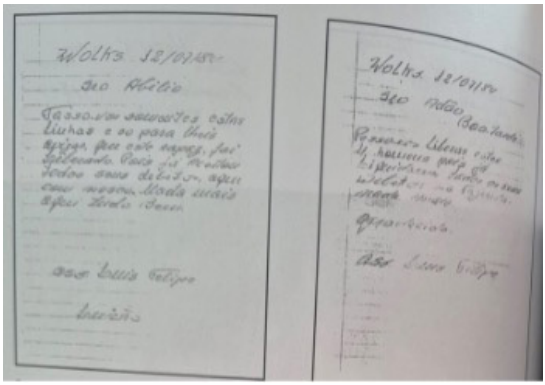

Figure 4 Authorization for the worker to leave the farm. Source: Archive of the Contemporary Slave Labor Research Group (GPTEC)

Indebted workers were not able to leave the farm without permission from the "cats", finding themselves under constant surveillance, subject to acts of violence, and with restrictions on their freedom. According to testimonies, escape attempts resulted in persecution, beatings, tying up, armed threats, and even homicides, with disappearances and the concealment of bodies in rivers and caves in the region. It is noteworthy that contractors preferred young people, even 17-year-olds, due to their greater capacity for the very physically demanding work of tree felling. There were cases, such as the one reported below, where the person recruited was elderly, though.

> Servino Barreira de Almeida, 75, retired, born in Balsas, Maranhão, resident of Paraíso do Norte, claims to have been hired on April 4, 1984, by Mr. Joaquim Gringo to work on Volkswagen's Vale do Rio Cristalino farm in the municipality of Redenção, Pará. The agreement was for payment of Cr$120,000.00 for grazing land rental, with road expenses paid by the cattle owner. Upon arriving in Barreira de Campos, Joaquim Gringo handed him over to Mr. Ábílio, who altered the agreement, reducing the payment to Cr$40,000.00 and requiring to cover transportation expenses be paid by the workers. The group had more than twenty workers. He states that during his time working there, he became ill with a wound on his forehead that became infected and bled, without receiving medical treatment. He reports that in the tent there were two gunmen armed with revolvers and 12-gauge shotguns, as well as a hanging "chilena" (a type of knife), used to threaten the workers. He reports that he worked for 4 months and 21 days and received only Cr$100,000.00, with a balance of only Cr$10,000.00 remaining on the day he left. He went two days without eating on

> the farm, in degrading conditions (thorns, mud, water up to his knees). (Brazil 2025, 147)

The account of Servino Barreira de Almeida, an elderly worker, illustrates the various pieces of evidence gathered in the court case, demonstrating the slave-like working conditions of those who worked at the Volkswagen Farm, highlighting fraudulent recruitment, harmful contract alterations, non-payment of full wages, degrading conditions, and the presence of armed guards for surveillance and coercion.

Contemporary slave labor conditions are rooted in the vulnerabilities of the individual, and in Brazil, these workers are caught up in a system of structural inequality and discrimination within society. In the case of Workers of Fazenda Brasil Verde v. Brazil, ruled on October 20, 2016, the Inter-American Court of Human Rights analyzed the phenomenon of slave labor in Brazil within the context of the country's historical structural discrimination, which has systematically allowed and continues to allow the violent exploitation of human beings. Slave labor exploits the workforce, reducing workers to mere disposable commodities, thus violating their dignity (Miraglia 2020, 129).

According to the Inter-American Court (Inter-American Court of Human Rights 2016, 87), individuals in vulnerable situations are entitled to special heightened protection, due to the special duties imposed on the State to satisfy its general obligations to respect and guarantee human rights. The Brazilian State must therefore take all necessary measures with due diligence to prevent and eradicate slave labor. In this case, the accountability of those agents who committed this violation stems from these State duties of guarantee, which arise from international commitments.

4 The Legal Process: The Non-Applicability of Statutes of Limitations to Contemporary Slavery and the Responsibility of Volkswagen Brazil

In civil lawsuit No. 0001135-97.2024.5.08.0118, the Public Ministry of Labor sought to convict Volkswagen Brazil for its responsibility for practices that constitute slave labor and human trafficking, as well as widespread disregard for occupational health and safety standards between 1974 and 1986 at the Vale do Rio Cristalino Farm.

In its defense, the company argued that it would not be possible to retroactively apply current concepts and parameters to judge conduct that allegedly occurred between 1970 and 1986, even before the 1988 Constitution of the Republic came into force. Therefore, any assessment of the facts should consider the normative and cultural context of the time under penalty of violating the principle of legal

certainty. On this basis, the events that occurred would not constitute slave labor and human trafficking, but only possible violations of labor rights that would be time-barred under national law. However, this argument was not accepted by the Labor Court. According to the ruling, in the 1970s and 1980s, there was already an international obligation to prohibit and repress slavery in all its forms, as Brazil was bound by domestic and international norms that forbade slavery and demanded respect for the minimum dignity of workers (Brazil 2025, 138).

The prohibition of slavery and its analogous forms constitutes a peremptory norm of international law – jus cogens – which cannot be derogated from or modified by a subsequent norm, pursuant to Article 53 of the Vienna Convention on the Law of Treaties. The rejection of slavery is one of the earliest and most robust consequences in international society, and was expressed in the first historic milestone in the process of internationalizing human rights, the Universal Declaration of Human Rights (UDHR).

Several international normative instruments which had been ratified by Brazil were in force at the time of the events, such as the 1926 Slavery Convention, the Supplementary Convention on Slavery of 1956, and Conventions No. 29 and 105 on Forced Labor of the International Labor Organization, all to prevent, investigate, punish, and redress human rights violations that constitute slavery and its analogous forms. In addition, the country also ratified the 1966 International Covenant on Civil and Political Rights, which establishes in Article 7 that no one shall be subjected to torture or to cruel, inhuman, or degrading treatment or punishment.

In recognizing the imprescriptibility of slave-like labor, the ruling concluded that imprescriptibility derives from the 1988 Constitution of the Republic, which prohibits slavery and enshrines human dignity as a foundation of the Republic; from international human rights law, which treats slavery as an irrevocable norm of jus cogens, and from the consolidated jurisprudence of the Superior Court of Justice (SCJ) and the Superior Labor Court (SLC), which extend the non-applicability of statutes of limitations to civil and collective redress actions in cases of serious human rights violations.

The Labor Court ruling affirmed the duty of the national judiciary to monitor conventionality[2] by harmonizing domestic legislation with international human rights treaties ratified by Brazil. In this regard, it is considered that the decisions of the Inter-American Court are

2 According to André de Carvalho Ramos, within the domestic jurisdiction, the control of national conventionality in the field of human rights consists of analyzing the compatibility between laws (and normative acts) and international human rights treaties, carried out by Brazilian judges and courts when ruling on specific cases.

binding, not only in their operative part, but also in their reasoning (ratio decidendi). On this basis, the court applied the understanding of the Inter-American Court in the judgment of the case of Workers of Fazenda Brasil Verde v. Brazil.

In this ruling, Brazil was convicted of violating the right not to be subjected to slavery and human trafficking, as provided for in Article 6.1 of the American Convention on Human Rights (Inter-American Court of Human Rights 2016). The Court established that contemporary slave labor constitutes a serious violation of human rights and is therefore not subject to a statute of limitations, because recognizing the statute of limitations would mean preventing investigation, accountability, and redress for victims.

The Inter-American Court affirmed that States have an obligation to guarantee the creation of the necessary conditions to prevent violations of the inalienable right not to be enslaved and, in particular, the duty to prevent their agents and private third parties from violating it. Regarding the state's obligation to guarantee this right, it was considered that this implies the state's duty to prevent and investigate, with the adoption of comprehensive measures to comply with due diligence in cases of contemporary slavery, with an adequate legal framework for protection and its effective application, as well as prevention policies and practices that allow for effective action in response to complaints (Inter-American Court of Human Rights 2016, 83).

In this regard, the Inter-American Court of Human Rights found that the crime of slavery and its analogous forms are not subject to statutes of limitations under international law due to their nature as crimes under international law, whose prohibition has attained the status of jus cogens. According to the Court's jurisprudence, crimes constituting serious human rights violations cannot be subject to statutes of limitations. Thus, the "Court's decision obviously has the effect of declaring that slavery and its analogous forms are imprescriptible, regardless of whether they correspond to one or more criminal offenses under Brazilian domestic law" (Inter-American Court of Human Rights 2016, 112).

With respect to Volkswagen Brazil's responsibility, the lawsuit gathered evidence detailing the Farm command and oversight structure, with emphasis on the command and oversight exercised by the Company, the continuous control of the export profit chain, and the international technical cooperation involved in the Farm's activities:

> Command and supervision: Volkswagen's standardized safety protocols, uniforms, surveillance, and repression, and inspectors/managers who met, decided, and checked services — typical elements of activity management and operational interference,

> useful for recognizing economic groups by coordination (Art. 2, §2, CLT) and removing the neutrality of contract agreements (primacy of reality);
>
> Profit chain: exports of wood and meat, technical cooperation with German institutions, integration with meatpacking plants, and destination of production to Europe –demonstrating economic benefit and nexus of imputation (beneficiary taker). (Brazil 2025, 153)

Recognizing Volkswagen Brazil's responsibility, labor judge Otávio Bruno da Silva Ferreira ordered the company to pay R$ 165,000,000.00 in compensation for collective moral damages, which will be transferred to the State Fund for the Promotion of Decent Work and the Eradication of Slave-like Working Conditions in Pará (FUNTRAD/PA). In addition to the compensation, the company must comply with a series of remedial and preventive measures, such as a public apology to society and the affected workers; the dissemination of an official statement on social media, the company's website, newspapers, radio, and television; the creation of an accessible reporting channel protected against retaliation; the implementation of independent audits and human rights policies with a "zero tolerance" clause for slave labor; mandatory training for managers and operational teams; and the annual publication of human rights reports for three years.

The case is currently under appeal before the TRT-8th Region, and its outcome will constitute an important chapter in Brazil's history of combating contemporary slave labor. By affirming the imprescriptibility of this serious human rights violation and reinforcing companies' commitment to the protection of human rights, the Brazilian Judiciary contributes to the consolidation of substantive democracy in the country and the continuation of transitional justice.

5 Final Considerations

The conviction of Volkswagen Brazil for contemporary slave labor and human trafficking at the Vale do Rio Cristalino farm contributes to an understanding of the dynamics of structural inequality in Brazilian society by highlighting the complex relationship between foreign capital and the military dictatorship in the exploitation of the Amazon and its workers. The investigation showed that Volkswagen's significant economic prosperity in Brazil was based on a state economic policy that favored land and income concentration within a context of suppression of labor rights and political persecution of dissidents of the regime.

In this context, the Volkswagen Farm, internationally promoted as a model project of development and modernization, was in fact a site of environmental degradation and serious human rights violations, with migrant workers subjected to contemporary slavery and human trafficking.

The Labor Court's decision, which recognized Volkswagen Brazil's responsibility and declared these serious violations imprescriptible, based on the Fazenda Brasil Verde case of the Inter-American Court of Human Rights, reiterates the Brazilian State's duty to prevent, investigate, punish, and remedy slave labor. The conviction for collective moral damages and the imposition of reparatory and preventive measures strengthen the need for companies to make an unequivocal commitment to due diligence in human rights. On November 17, 2025, some surviving victims of the case filed individual labor lawsuits before the Labor Court in Redenção. Their lawyers are seeking one million reais for each worker and have requested priority processing. Due to the company's resistance to acknowledging the crime or reaching an amicable agreement, the case may still be prolonged; in the meantime, additional victims of the company may not be able to receive compensation during their lifetime.

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Part II
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Inequality that Produces Precarious Work: The Concentration of Income and Wealth also Shapes the Brazilian Labor Market

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Abstract The article analyzes the relationship between the high concentration of income and wealth and the formation of a labor market structurally marked by precariousness in Brazil. The central hypothesis argues that social inequality is not merely a byproduct of economic dynamics, but an organizing principle that shapes occupational morphology, encouraging the creation of low-productivity and poorly paid jobs. These are concentrated especially in personal services, notably where women and the Black population are most represented.

Keywords Social inequality. Labor market. Precariousness. Race and Gender. Brazil.

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1 Introduction

Social inequality occupies a central place in Brazilian social formation and has been widely analyzed under the dimensions of income, wealth, and access to social rights and public goods. However, specialized literature still frequently treats the occurrence of inequality merely as a phenomenon circumscribed to economic dynamics, technological progress, and the interactions between labor supply and demand. Although these determinants are fundamental, such an approach tends to obscure a central aspect of the Brazilian reality: the occupational structure is also conditioned by the high degree of income and wealth inequality that affects the pattern of social demand, productive organization, and job quality.

In this perspective, the purpose of this article is to show that inequality also has an impact on the economic structure and the occupations created, as the level of employment and the quality of job positions do not result solely from the dynamics of market forces, but also from a structure of social relations shaped by economic hierarchies, class privileges, political power, and racial and gender discrimination.

Our hypothesis is that the unequal distribution of income and wealth organizes the occupational morphology of the Brazilian economy, producing and reproducing a broad sector of low-productivity, low-paid, and precarious occupations concentrated in personal services. Thus, by influencing the organization of production, the modalities of service provision, and consumption patterns, inequality itself contributes to the generation and reproduction of a highly unequal and precarious occupational structure, strongly marked by hierarchies of class, race, and gender. In other words, the labor market not only reflects pre-existing inequalities but constitutes one of the primary mechanisms of their reproduction.

In the Brazilian case, the expansion of personal service activities observed in recent decades intensifies due to the process of premature deindustrialization, technological advances, the progressive increase in rentierism, and transformations in the demographic profile, marked by rising life expectancy and a sharp reduction in birth rates.

The article engages with the critical literature on structural inequality, the political economy of labor, and the economics of services, as well as approaches that emphasize structural heterogeneity and the centrality of labor in social reproduction. Empirically, it utilizes data from the PNAD (IBGE) – focusing on activity sectors, earnings, education, and occupational status – seeking to highlight how class, race, and gender inequalities are expressed both in restrictions on access and in the quality of jobs. Furthermore, considering that economic inequality in Brazil is even more acute when analyzing the dimension of wealth, recent data regarding the sharp concentration of wealth that characterizes the country will also be used.

2 Social Inequality and the Historical Formation of Brazilian Capitalism

Social inequality constitutes a structural and persistent feature of Brazilian social formation, deeply rooted in its history and in the specific forms of the constitution of capitalism in the country. Far from being the result of conjunctural dysfunctions or recent institutional failures, inequality in Brazil expresses a long-lasting pattern of social reproduction, spanning different political regimes, economic cycles, and institutional arrangements (Furtado 1994; Prado Jr. 1966; Fernandes 1975). Thus, the historical formation of Brazilian capitalism produced a labor market that structurally generates precarious work, marked by the racialization of labor in service activities.

The legacy of slavery occupies a central place in this process. Brazil was the last country in the West to abolish slavery and did so without implementing policies for the social, economic, or productive integration of the freed population. As Florestan Fernandes (1975) demonstrates, the transition to free labor occurred through explicit mechanisms of racial exclusion, which relegated the Black population to the most precarious forms of occupational insertion or to social marginalization.

The political choice to encourage European immigration and not incorporate the Black workforce into the incipient wage labor market that emerged during the heyday of the coffee economy (1870 to 1930) was sustained by racist and eugenicist ideologies that associated economic progress with the 'whitening' of the population and the supposed 'modernization' of Brazilian society (Schwarcz 1993). This process established, from the outset, a racial segmentation of the labor market, worsened by a culture of privilege and discrimination, the effects of which persist to this day.

The subsequent structuring of the Brazilian labor market promoted by the processes of industrialization and urbanization was unable to break with that unequal and exclusionary pattern. Although the country built a relatively advanced legal-labor framework starting in the 1930s, inequality remained a constitutive element of national capitalism. Authors[1] indicate that Brazilian development was marked by the coexistence of economic growth, high income concentration, and precarious labor relations. Baltar (2003) shows that the effort of political elites to promote national industrialization was not matched by the same impetus to overcome social backwardness and the acute inequalities perpetuated since the colonial past. Industrialization and economic modernization were accompanied by the maintenance

1 Check Mattoso 1995; Pochmann 1995; Henrique 1998; Fagnani 2005.

of archaic social relations, heighten by periods of authoritarian governments, a precarious and partial Social State, an accelerated and ungoverned urbanization process, and the permanence of a large structural surplus of the labor force.

High land concentration drove intense internal migration flows throughout the 20th century. Between 1940 and 1980, approximately 39 million people migrated from the countryside to the cities, without the conditions for the productive absorption of this contingent, resulting in the expansion of informal work, underemployment, and the precariousness of living conditions in cities (Mello, Novais 1998, 581; Oliveira 1998). Throughout those four decades of intense migratory shifts, the country went through a period of great political instability, with seven coup attempts between 1946 and 1964, when a military dictatorship was then established. It lasted 21 years and consolidated a pattern of "conservative modernization" characterized by the combination of economic growth, political repression, and the deepening of social inequalities (Draibe 1993). Despite the high economic growth rates that reached an annual average of 11% during the "economic miracle" (1968-73) and were accompanied by employment expansion, unions did not have the right to organize freely, and collective bargaining was supervised by the State (Krein 2007). Consequently, in 1980, during the waning years of the military regime, social inequality had worsened significantly, while the wage gap and the heterogeneity of the labor market widened.[2]

Later, with the return to democracy and despite the advances established by the Federal Constitution of 1988 – which was noted for the universalization of social rights and the guarantee of individual rights – the restrictions imposed by the external debt crisis and the resulting derailment of the economic development process, combined with the advances of financial globalization and neoliberal ideology, imposed severe constraints on public policy action and the realization of the Social State enshrined in the Constitution (Fagnani 2005).

However, some years later, between 2003 and 2014, Brazil experienced an exceptional period in its historical trajectory, combining economic growth with a reduction in labor income inequalities. As pointed out by Manzano (2017), throughout three consecutive terms of labor-aligned government in the country, the Gini Index of labor earnings fell consistently, primarily due to the

2 Already in the 1980s, amidst the economic crisis and the democratic transition, intense union mobilization, expressed in massive strikes, was fundamental to containing the further deterioration of real wages and partially restoring the purchasing power of workers (Noronha 1991; Krein 2007; Baltar 2003). Were it not for the political effervescence of those years of struggle for the return to democracy, with the notable protagonism of social movements, inequality would very likely have reached even higher levels (Manzano 2017).

policy of real increases in the minimum wage, the advancement of labor formalization, and the relative strengthening of collective bargaining (Krein 2018). The increase in the minimum wage had a direct impact on the earnings of workers at the base of the social pyramid, contributing to the reduction of wage inequalities, even though, given the contingencies associated with the neoliberal macroeconomic architecture, there was no more substantive process of income redistribution, nor was the extreme concentration of wealth that characterizes the country reversed (Manzano 2017).

However, this positive moment at the beginning of the 21st century proved to be politically fragile and short-lived. Following the economic crisis of 2015-2016 and the ultra-liberal reforms implemented after the institutional coup of 2016 – especially the one establishing the public spending cap and the labor reforms of 2017 and pension reforms of 2019 – a reversal of that process was observed. According to IBGE data (PNAD 2025), the second half of the 2010s saw an increase in informality, with a drop in average labor income and greater wage dispersion, indicating a new cycle of deepening inequalities (FPA 2022; Manzano 2023).

3 The Persistence of Inequality and its Relationship with the Morphology of Occupations

Inequalities manifest themselves in a structural and multidimensional manner. The matrix of social inequality, formulated by The Economic Commission for Latin America (ECLA), links social class, gender, race/ethnicity, age, and territory as structural axes that intersect and reinforce each other throughout the human life cycle and the history of nations (FPA 2022).

In the sphere of work, this matrix is expressed in income inequality, access to employment, the quality of occupations, and the coverage of social protection. Thus, class inequality remains a fundamental dimension, but its concrete manifestation is inseparable from the dimensions of gender and race – especially in a society like Brazil, marked by a slave-holding legacy and a culture of privilege that naturalizes social hierarchies and perpetuates itself through recurring discriminatory practices (FPA 2022).

The first structural form or manifestation of inequality concerns the distribution of income and wealth. Recent studies from the World Inequality Database (WID 2025), coordinated by Thomas Piketty's team, indicate that Brazil consistently ranks among the most unequal countries in the world, with a strong concentration of income at the top of the distribution: the richest 10% of Brazilians hold 59.1% of national income, while the poorest 50% hold 9.3%, placing Brazil as the 5th most unequal country in the world. However,

when considering wealth, the situation is even more severe. As seen in Table 1, Brazilians in the top 10% concentrate 70.1% of national wealth, while the bottom 50% hold only 2.4%.

Table 1 Income and Wealth Inequality in Brazil (2024)

Distribution Segment	Avg. Income (PPP €)	Share of Income (%)	Avg. Wealth (PPP €)	Share of Wealth (%)
Full Population	12,542	100.0	46,047	100.1*
Bottom 50%	1,167	9.3	1,105	2.4
Middle 40%	9,916	31.6	31,772	27.6
Top 10%	74,143	59.1	332,789	70.1
Top 1%	332,335	26.5	1,703,738	37.0

Interpretation: All values are estimated at per capita (full population) level. Sources and series: http://wir2026.wid.world/methodology

According to IBGE data (PNAD 2025), in 2024 the ratio between the real average monthly per capita household income of the richest 1% and the poorest 50% of the Brazilian population reached 30.5, highlighting the high degree of income concentration in the country. In the same year, the ratio between the income of the richest 10% and the poorest 40% was 13.4, confirming that inequality remains sharp even when comparing broader strata. These indicators reveal that income inequality in Brazil is not restricted to the extremes of distribution but permeates the entire social structure.

Regarding wealth distribution data collected by "FGV Social", the average wealth of the top 1% of the Brazilian population reached US$ 822,000 per capita, evidencing the high degree of asset concentration. This data aligns with the World Inequality Report 2026 (WID 2025), demonstrating that inequality in Brazil is not limited to current income but is deeply rooted in the distribution of accumulated wealth, which tends to be even more concentrated than income.

From a labor market perspective, inequality is expressed in earnings differentials, as shown in Table 2. In 2024, nearly 70% of the population aged 14 or older with earnings received up to two minimum wages (approximately US$ 470 as of late 2024), revealing that the vast majority of workers are concentrated at the base of the distribution. In contrast, only 7.8% earned above R$ 7,350 monthly (around US$ 1,220.00), while very high-income strata are negligible: 0.16% received above R$ 50.000 (approximately US$9,000.00), and only 0.02% above R$ 100,000 (around US$ 18,000.00). These data indicate a deeply asymmetrical structure where the labor force is organized around low earnings, while a tiny minority concentrates

vast wealth, expressing the prevalence of a low-wage economy and the structural nature of class inequality.

Table 2 Persons aged 14 or older with income by selected monthly effective nominal income brackets (Brazil 2024)

Income Brackets (in R$)	Absolute Numbers	Share (%)
Up to 2 Min. Wages (2,824)	96,231,226	68.77
Over 2,824 to 5,000	26,190,682	18.72
Over 5,000 to 7,350	6,557,198	4.69
Over 7,350 to < 50,000	10,728,203	7.67
50,000 to < 100,000	189,734	0.14
100,000 or more	32,966	0.02
Total	**139,930,008**	**100.00**

Source: Annual Continuous PNAD Microdata/IBGE. Prepared by André Krein

A second dimension of Brazil's severe inequality is its racial character. Even in periods of economic growth, Black workers present systematically lower average earnings than white workers, in addition to higher exposure to unemployment, informality, and low-skilled occupations. As demonstrated by the IBGE household survey (PNAD 2025) the average earnings of Black women and Black men correspond to approximately 59% and 76%, respectively, of the average earnings of the total employed population, highlighting the persistence of a structural pattern of racial discrimination that has remained virtually stable since the beginning of the series in 2012.

A third dimension of inequality concerns gender. Despite the increase in female education – in 2024, the net higher education enrollment rate was 25.1% for women and 19.1% for men – and recent institutional progress, such as the 2023 Pay Transparency Law, women continue to earn less than men. As demonstrated by IBGE data, women earn, on average, about 20% less than men. Paradoxically, this inequality tends to intensify at higher education levels and in higher-skilled occupations. Among directors and managers, the gap exceeded 28 percentage points, and among science professionals and intellectuals, it reached 35 percentage points (Teixeira, Saliba 2024).

In summary, social inequality in Brazil is not a residual or transitory phenomenon, but a structural element of its historical formation and capitalist development pattern. Although specific public policies have partially mitigated its effects in certain periods, class, race, and gender inequalities continue to decisively organize access to work, income, social protection, and citizenship. It remains clear that the world of work is one of the primary vectors for the production and reproduction of social inequalities in Brazil.

4 Job Creation and Economic Dynamics

The relationship between economic growth, development styles, technological patterns, and income concentration in Brazil is characterized, on one hand, by the existence of an elite with immense power to consume private services and a large, permanent structural surplus of labor. On the other hand, there is a vast mass of low-income workers, dispossessed of property and with precarious access to public goods, who depend on selling their labor in low-cost services for survival. In essence, income concentration itself drives the demand for personal services; high-income families hire a wide array of attendants ranging from domestic workers, nannies, drivers, and caregivers to "personal service" professionals such as consultants, interior designers, and specialized organizers.

This phenomenon is not unique to Brazil but is a characteristic of capitalism since the mid-20th century, as the occupational structures of industrialized economies shifted toward service activities. Within the academic debate, authors such as André Gorz (2003), Segal (2020), and Delpierre (2022) have noted similar processes in core economies, where economic elites convert social exclusion into private convenience, purchasing their own leisure time by hiring marginalized masses for precarious and low-paid services. However, while this appears to be a general trend in advanced capitalist economies, the Brazilian case is significantly more severe due to two distinct and complementary reasons.

The first reason concerns the conservative nature of peripheral economic modernization which, despite the exceptional vigor of the industrialization process, coupled with the legacy of slavery, has historically left the majority of the population on the margins of citizenship. This created a perpetual reservoir of available and very cheap labor – what Jessé de Souza (2006) termed the "*ralé estrutural*" (structural rabble) – to serve the personal demands of affluent families and perpetuate the symbolic domination facilitated by their economic status.

The second reason is the premature nature of the deindustrialization process, which occurred before the productive structure reached maturity or sophistication. This led to a hypertrophy of personal service activities, in contrast to the deindustrialization observed in mature economies, where the transition involved a greater share of highly qualified, high-value-added service activities such as R&D, design, engineering, and financial consulting. Consequently, it is no coincidence that in a comparative study measuring social inequality by the "right to command the labor of others", Paul Segal (2020) found Brazil to be the most extreme case. Thus, in the Brazilian historical context, a service sector has developed disproportionately, characterized by low

wages and reduced productivity, contributing little to value addition and having limited effects on economic dynamics.

This process can be synthesized in the following chain:

i. Backward, unsophisticated, and underdeveloped productive structure
   → Inadequate and insufficient to absorb the entirety of the available workforce;
ii. Concentration of income and wealth
   → Promotes a social fracture that organizes labor exploitation circuits outside the sphere of capital accumulation – that is, it drives the exploitation of servile activities;
iii. Development of a mass of workers in subsistence conditions who find no place in the sphere of capitalist accumulation
   → Workers who submit to servile, cheap, and precarious activities, crystallizing a social structure marked by class privileges;
iv. Expansion of personal services intensive in cheap, racialized, and feminized labor
   → Generation of a broad set of low-wage occupations, high informality, and reduced social protection;
   → Women and Black people are concentrated in the most vulnerable positions of the labor market;
v. Reinforcement of income, race, and gender inequality
   → Feeds back into the unequal pattern of production and consumption, as well as the occupational structure itself.

The explanation for this historical process is rooted in economic, social, and institutional factors. As analyzed by Baltar (2003), the formation of the urban labor market in Brazil was shaped not only by incomplete industrialization and high income concentration – both of which limited the expansion of stable employment – but also by the absorption of the available workforce into poorly structured tertiary activities characterized by low wages and high turnover. These arrangements tend to operate outside of long value chains and exhibit weak technological incorporation, thereby reinforcing flexible and informal modes of contracting. The author demonstrates that, historically, the expansion of urban employment in Brazil has been driven less by the generalization of protected wage labor and more by the multiplication of service occupations with low institutionalization, particularly during periods of economic stagnation or crisis. This pattern is not residual; rather, it is functional to the reproduction of an unequal economy, as it sustains differentiated consumption patterns without altering the underlying structure of income distribution.

Furthermore, economic inequality is articulated through social and racial hierarchies that condition who occupies these precarious positions. Quadros (2026) demonstrates that even when social mobility

occurs, as seen during the PT (Workers' Party) administrations, discrimination against upwardly mobile Black individuals takes place within a highly hierarchical space Where Black and some mixed-race populations face symbolic, institutional, and occupational barriers. In this sense, inequality does not merely generate precarious jobs but organizes them along lines of class and race, naturalizing relations of subordination. Finally, the role of institutions, particularly the State, is paramount, as the persistence of inequality is associated with selective and incomplete labor regulation. While certain segments are protected, vast areas of the labor market remain devoid of social rights or are deliberately deregulated, as evidenced by the labor reforms beginning in the 1990s. Across different historical moments, the State's inability to universalize social protection standards has resulted in a structurally heterogeneous labor market in which precariousness ceases to be transitory and is instead reproduced as the norm (Baltar 2003).

In summary, the structural fragility of the national development model and the persistence of low income fuel a cycle of informality that affects about 40% of workers, concentrating them in survival and low-productivity occupations. This scenario is aggravated by racial and gender inequalities, which confine women and Black people to the most precarious positions, causing the labor market to act as a reproducer of social hierarchy, underpinned by historical prejudice and discrimination. Ultimately, this segmentation blocks economic growth and prevents the formation of a virtuous cycle of innovation and national development.

5 Occupational Structure: Recent Transformations

The analysis of the sectoral structure of employment reveals that the Brazilian labor market is largely dominated by the services sector, which accounts for approximately 70% of all employed persons. Between 2012 and 2025, there has been stability in industrial employment, a decline in agricultural occupation, and the consolidation of the service sector as the primary absorber of the workforce. It is important to highlight the sector's heterogeneity, driven by the expansion of social occupations, particularly in the fields of health, caregiving, and personal services (PNAD 2025)

An analysis by occupational groups also reveals significant shifts in the employment structure. Service workers and shop and market sales workers – the largest occupational group – increased their share from 18.4% in the third quarter of 2012 to 21.8% in 2025. This represents a 34.4% growth in the number of people employed in this category. This performance was only surpassed by the growth of members of the armed forces (48%) and professionals in the sciences

and intellectual fields (58%), segments which possess very different dynamics regarding qualification and remuneration.

In contrast, skilled industrial workers, operators, and related occupations grew by only 9% during the same period. This indicates a process of relative loss and a shift of employment toward service activities, which are generally more heterogeneous and characterized by higher turnover and informality.

From an earnings perspective, inequalities are stark. In 2025, the average income for service and retail workers was R$ 2,509.21 (~US$ 503), significantly lower than the overall average for employed persons (~US$ 631.30) – representing only 72% of the average income. The situation is even more critical for Black women within this group, whose average income did not exceed R$ 1,760.53 (~US$ 317). This reveals an intersection of gender, race, and occupational status inequalities. These data confirm that the expansion of service-sector employment has been accompanied by a sharp relative decline in income and a concentration of Black women in the most precarious positions.

Domestic work in Brazil is a heterogeneous category encompassing everything from general services and personal care for children, the elderly, and pets to roles such as cooks, drivers, security guards, and gardeners. Quantitatively, the sector employed 6 million people in 2012, decreasing to 5.87 million in 2022 – a 2% reduction. This movement contrasts with the total labor market, which grew by 9.7% during the same period. Currently, the category represents 5.9% of all employed persons, having fluctuated between 5.3% in 2020 and 6.8% over the last decade.

The occupation is deeply marked by social inequalities, as 91.4% of those employed are women and 68% are Black. These figures highlight the persistence of the sexual and racial division of labor, concentrating historically vulnerable groups in roles often associated with lower prestige.

A significant reconfiguration is also taking place within the sector. While traditional "generalist" domestic services declined by 16% over ten years, there was explosive growth in specialized occupations, such as in-home personal care (157%), cooking (118%), security (97%), and childcare (33%). Today, caretakers for individuals and children account for 22% of the total category, reflecting demographic shifts like population aging and the "commodification of care" by high-income families.

From an income perspective, precariousness remains a constant. In 2022, the average monthly income for domestic workers was only 38.7% of the national average, a proportion that has remained stagnant since 2012. Although the average hourly income reached 51.9% of the general average, the data shows that specialization has not been accompanied by wage appreciation or substantive improvements in working conditions. Ultimately, the sector remains

a primary mechanism for the reproduction of gender and racial inequalities in Brazil.

6 Structural Precarization: Informality, Self-Employment, and Platforms

6.1 Informality

Informality, as measured by the IBGE (PNAD 2025), has shown a growth trend among both men and women over the last decade. In the fourth quarter of 2015, 39.7% of employed men were in informal positions. Among women, the informality is around 40.7%.

In absolute terms, while the total employed population grew by 11% between 2015 and 2025, the number of informal workers increased by 19%, revealing that employment expansion occurred mostly through unprotected ties. This movement had a disproportionate impact: among women, the growth of informality was 28%, more than double the rate observed among men (13%). This result demonstrates that increased female labor force participation has largely occurred through unstable occupations linked to personal and care services – jobs that are poorly paid and lack access to social protection, thereby reinforcing existing structural inequalities.

6.2 Self-Employment

Self-employment has historically been concentrated in activities related to the provision of personal and domestic services, a trend that has intensified in the last decade, especially due to the aforementioned expansion of care services. Among the 20 largest occupations in this category, there was a 56% growth between 2012 and 2025, indicating that these services are primarily provided through autonomous work without employment ties, reinforcing individual initiatives.

The highest growth occurred in occupations typically linked to services and direct provision to families and companies: specialists in beauty treatments and related fields (25%), car, taxi, and van drivers (88%), door-to-door salespersons (47%), and motorcycle couriers (85%). These activities are frequently characterized by low social protection, unstable earnings, and long hours, often associated with digital platforms and the transfer of business risks to individuals.

This pattern reinforces the trend toward the individualization of labor relations and the expansion of occupational forms that, while increasing access to work, deepen informality and economic

vulnerability. This has particularly severe impacts on women and the Black population, perpetuating inequalities.

In a comparison between 2012 and 2020, among occupations that had more than 500,000 workers with formal contracts, a significant drop in formal employment is observed over the decade. The largest reductions occurred among shop assistants and store clerks (-14%), security guards (-18%), car, taxi, and van drivers (-39%), and, even more sharply, among construction workers, such as masons (-53%) and elementary building construction workers (-70%). These are occupations traditionally associated with low and middle wages which, in the formal sector, guarantee access to labor rights, social security protection, and some income stability.

In contrast, during the same period, there was a strong expansion of self-employed occupations, especially among those that grew to include more than 100,000 workers by 2020. Notable increases include retail workers (80%), door-to-door salespersons (165%), car, taxi, and van drivers (93%), motorcycle couriers (53%), hairdressers (35%), beauty specialists (25%), cooks (56%), and, even more intensely, street vendors and food service workers (183%). The explosive growth of telephone salespersons is particularly striking – expanding more than a thousand times – signaling significant changes in commercial intermediation patterns and labor organization centered around e-commerce. Work mediated by e-commerce is organized through a fragmented chain of activities, combining digital technology, outsourcing, and flexible hiring practices.

The loss of formal positions in mass occupations was not compensated for by higher-quality jobs, but rather by activities marked by income instability, a lack of social protection, greater exposure to economic risks, and the transfer of labor costs to the worker. Thus, even though some of these occupations show quantitative growth, it is an expansion associated with precarization rather than an improvement in living conditions.

From a distributive perspective, this movement tends to widen social inequalities, as it deepens labor market segmentation between an increasingly narrow core of protected jobs and a broad base of workers engaged in low-wage, high-turnover activities with weak social security coverage. At the same time, it weakens collective labor regulation and wage bargaining mechanisms, contributing to the compression of average incomes and increasing social vulnerability, particularly among workers with lower education levels and those who have historically occupied more precarious positions in the labor market.

7 Occupational Morphology, Race, and Gender: Evidence from the 20 Largest Occupations

An analysis of the 20 largest occupations by sex and race **[tab. 3]**, based on microdata from the IBGE national household sampel survey (PNAD 2025) for 2012 and 2025 (third quarter), corroborates the article's central hypothesis: income inequality, interacting with racial and gender hierarchies, acts as a factor in shaping Brazilian occupational morphology. The data highlight the persistence of structural segmentation in the labor market, where unequal opportunities for entry are systematically reproduced over time.

Table 3 Largest 20 Occupations by Ethnic-Racial Profile and Gender – Q3

Indicator	Black Women	White Women	Black Men	White Men
Main Occupation	Domestic workers (20.7%)	Clerks (12.1%)	Construction Workers (12.2%)	Retail Workers (8.3%)
Precariousness*	54%	45%	48%	40%
Main Changes (2012-2024)	-17% in domestic workers	-32% in domestic workers	-6% in Construction Workers	-35% in Construction Workers
Presence in Education	5.50%	5.60%	0.90%	3.60%

Source: IBGE/PNAD-C Annual. Authors' own work. (*) Percentage of people employed in jobs classified as precarious according to criteria of informality and income

Black women remain heavily concentrated in occupations linked to domestic work and care services. In 2012, general domestic services already constituted the main occupation for this group, with 3.1 million Black women employed. In 2025, despite an absolute reduction to 2.6 million, this role remains the predominant occupation, followed by shop assistants/saleswomen and cleaning workers. Together, these three occupations accounted for more than 5.2 million Black women, corresponding to approximately 42% of the group's total. In proportional terms, 18% of employed Black women were in domestic services in 2025, compared to 11.4% of white women – a difference of 6.6 percentage points that clearly expresses racial segregation.

Among Black men, there is a concentration in manual, physically demanding, and higher-risk occupations associated with low wages and high informality. In 2025, the main occupations for this group were bricklayers, elementary construction workers, and farmers, which together totaled more than 4.1 million people, corresponding to 25.8% of all employed Black men. In comparison, white men had significantly lower participation in these activities: bricklayers, farmers, and elementary construction workers represented only 19.5%

of their group, evidencing a racial division of productive labor that reserves the most precarious and insecure positions for Black men.

White women, in turn, show greater occupational dispersion. In 2025, their main occupations included general office clerks, domestic services, and shop assistants. Although they are also present in precarious activities, there is a greater relative insertion in administrative and educational roles. Clerks represented 13.1% of employed white women, compared to 8.6% of Black women, and participation in elementary school teaching, while similar between the two groups, reveals a symbolic differential in access to occupations with greater social and institutional recognition.

Among white men, the concentration in commercial activities, heavy transport, and skilled agriculture stands out, as well as their presence in occupations requiring higher educational and institutional capital, such as law and inventory supervision – roles practically absent among Black men within the top twenty occupations. This pattern indicates greater relative access to positions with autonomy, stability, and better earnings, even within a labor market broadly marked by precarization.

Based on these data, three central morphological patterns can be identified: 1°) Racial Verticality: White individuals tend to occupy roles with greater autonomy and recognition, while Black individuals are concentrated in subordinate positions. Among men, for example, 16.8% of whites were in commerce and skilled transport occupations, compared to 12.4% of Blacks; 2°) Gender Horizontality: This is expressed in the concentration of women in care and service activities and men in productive and logistical occupations; in 2025, 20.7% of Black women were in domestic services, an occupation virtually non-existent among Black men; 3°) Intersectional Precarity: This places Black women at the top of the vulnerability hierarchy: 62% of Black domestic workers did not have a formal contract (carteira assinada), compared to 54% of white women.

Altogether, the data indicate that Brazilian occupational morphology is deeply structured by income, race, and gender inequalities. Black women remain overrepresented in domestic and care services; Black men in more insecure manual labor; while whites of both sexes access occupations with relatively higher levels of stability and recognition. This configuration is neither natural nor transitory, but historically constructed and politically sustained. It operates as a system of social labor allocation that reproduces privileges and disadvantages, relying heavily on occupations that require low schooling and offer limited possibilities for social mobility, reinforcing the cumulative and self-reproductive nature of inequality in the Brazilian labor market.

This configuration particularly clearly expresses the specificity of Brazilian society, in which social reproduction is historically secured

by sustaining a vast pool of low-cost personal services that function as the silent foundation of economic and social organization. Brazilian capitalism is thus structured around a dynamic that systematically transfers the responsibility for the daily maintenance of life to families, while simultaneously keeping the costs of this reproduction low through the precarization of labor. By relegating a significant portion of care and life-maintenance tasks to the private sphere and informality, the State limits its scope of action and reinforces the reproduction of class, gender, and racial inequalities.

The predominance of women – who are majorly Black – within personal services and domestic work highlights that women's integration into the labor market occurs largely through occupations that socially reproduce these roles under conditions characterized by instability, low wages, and a lack of rights. In this sense, while capital is structurally dependent on reproductive labor, it simultaneously disorganizes, devalues, and renders it invisible. Therefore, the persistence of an occupational structure based on poorly remunerated services does not represent a vestige of backwardness; rather, it constitutes a functional component for the reproduction of a prosperous yet unequal economy, which is sustained precisely by the differentiated exploitation of time, bodies, and the labor power of a specific segment of the working class.

8 Conclusions

As we have sought to demonstrate throughout this article, social inequality in Brazil acts as the primary organizing axis of the labor market, shaping an occupational morphology based on historical hierarchies of class, race, and gender, rather than being a mere reflection of the economy. Alongside a backward and unsophisticated productive structure, the extreme concentration of wealth in the hands of a tiny elite fosters a pattern of accumulation centered on rent-seeking and a consumption pattern geared toward low-productivity personal services. This results in the "servilization" of a vast portion of the population which, deprived of public goods and property, accepts degrading wages. This scenario is exacerbated by the country's slave-holding roots, which perpetuate the marginalization of Black workers and women in precarious and high-risk roles, creating structural barriers that resist even increases in education levels and maintain the market as a mechanism for the reproduction of privilege.

Currently, this structure of exclusion is deepened by rising informality and the expansion of work mediated by digital platforms, which transfer economic risks directly to the worker and weaken collective bargaining power. The study indicates that the growth of e-commerce and delivery services has consolidated labor vulnerability

as an inherent trait of contemporary Brazilian capitalism. Finally, it is concluded that merely redistributive reforms are palliative; truly overcoming this cycle requires a major transformation of the current productive model, frontally combating racial and gender discrimination to transform work into a right of citizenship and ensure truly universal social protection.

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Brazil: The Assetization of Rights Corroding the 1988 Social Compact

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Abstract This article analyzes the development of financial hegemony in Brazilian capitalism through successive expropriative dynamics. It first reconstructs the transition from 'elite financialization' (1981-94), characterized by high interest regimes and state privatization, to 'mass financialization' (1995-2016), driven by pension capitalization and the collateralization of social policy. These mechanisms expanded credit and indebtedness among working classes. The article then examines a new phase under Lula 3 centered on the assetization of social rights. In this configuration, the state actively creates and multiplies asset classes to finance welfare provision, most notably through sovereign securities earmarked for social policy. It argues that this model legitimizes a contractionary fiscal environment aligned with Brazil's New Fiscal Framework and reshapes the relationship between social rights, public finance, and financial markets.

Keywords Brazilian Capitalism. Financialization. Fiscal Austerity. Debt-led Social Policy. Assetization of Social Rights.

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1 Introduction

Since the turn of the century, the welfare regime anchored in the 1988 Brazilian Constitution has undergone a profound and unprecedented restructuring process, which has the growing assetization (Birch, Muniesa 2020; Adkins et al. 2020; Paulani 2024) of social provision as its defining feature, leading to a complete disfigurement of the social model agreed upon throughout the years of redemocratization.[1] This article starts from the assumption that the first wave of financialization of social policy, which gained traction starting in 2003, is now followed, under the third Lula administration, by a new stage that more openly institutes, at the State's initiative, the capitalization and multiplication of asset classes[2] as a mechanism for welfare provision.

In the first wave, the forms of financing and access to public goods and services in diverse areas (pensions, health, education, housing) introduced the capitalization of pensions and promoted the collateralization of social benefits (Lavinas 2017; 2020) as a stimulus for the expansion of 'individual' credit, resulting in a new phenomenon: the exceptionally high and constant degree of households' indebtedness to ensure social reproduction. In the new stage, the issuance of bonds by the Treasury, in parallel with the growing protagonism of private equity funds and institutional investors, seems to establish an unprecedented role for social policy, which becomes assetized, completely redefining its complementarity[3] with the financialized accumulation regime. By assetization, Birch and Muniesa (2020, 4) designate "the socially transformative character of the phenomenon of turning things into assets", meaning that all sorts of things can take the 'asset form' and encapsulate its properties as well. They outline aspects that mark out the asset form, including the fact that assets are legal constructs that involve different modes of

1 A preliminary version of this article was first published in 2024 in a collection organized by Professors André Singer, Cícero Araújo, Bernardo Ricupero, all from DCP-USP, and Professor Fernando Rugitsky from SOAS University of London. We are thankful to Ana Beatriz Getirana de Carvalho for the English editing.

2 Asset classes are groups of assets that share common characteristics that differentiate them from other assets. They serve the investment strategies of funds and institutional investors seeking to extract financial profits through capitalization.

3 Social policy is always shaped by the prevailing regime of accumulation. Under the Fordist paradigm, it was strongly complementary to the logic of industrial accumulation, which required a certain degree of redistribution – within the framework of the Fordist social contract – so that workers, by enjoying better health, education, and living conditions, could increase labor productivity and sustain a virtuous cycle of growth. Under a financialized regime, precarious work increasingly predominates, which means that rights are eroded and the market comes to prevail in the provision of services, thereby redefining the role of social policy, which loses both relevance and its complementary function in relation to accumulation.

ownership and control and comprise forms of rentiership that enable the extraction of rents (Lavinas 2025a, 16).

Here, we refer to assetization precisely as the process of turning something – often non-financial or intangible – into an economic asset that can generate future income or be exchanged in markets. In this sense, assetization leads to the continuous formation of fictitious capital, enhancing and deepening financialization and enabling rent-extraction. When it comes to the assetization of social policy, we mean that collective/universal rights – or legal guarantees that cannot be traded – are supplanted by individual rights, now expressed as property rights that can be negotiated.

New categories of risk emerge and compromise the idea of a redistributive social protection system that aspires to the universalization of rights. At the same time, the emphasis on public private partnerships (PPPs) as a way of granting the provision of public services with state guarantees to the private market becomes a strategy of the third Lula administration to minimize uncertainties in financial accumulation.

This article aims to map the ongoing transition between models of social provision (Bayliss, Fine 2020) in twenty-first-century Brazil, adopting the lens of the financialization of social policy and its consequences for emancipatory and redistributive logics. To that end, we begin by examining the trajectory through which financial hegemony consolidated itself within Brazilian capitalism. We then discuss the process of reconstruction and the new social-policy measures adopted under Lula's third administration, underlying their links to financial accumulation. This turning point appears to combine debt renegotiation targets (without forgiveness) aimed at benefitting defaulters by recycling them into the uptake of new loans, with the State acting as guarantor in the event of a new default. This is the case of the Desenrola Program, launched by the new federal executive shortly after taking office (2023), whose most notable consequence was the introduction – within the set of social policies – of an innovative program devoted exclusively to the management of household debt in default. This reveals how the state became involved in confronting contemporary forms of excessive financial expropriation by managing their impact on households' ability to continue relying on credit to make ends meet, while at the same time seeking to avert systemic risks to the banking system.

Simultaneously, initiatives developed in partnership with the *Comissão de Valores Mobiliários* (the 'Brazilian Securities and Exchange Commission') to promote basic services through the capitalization of individualized returns are advancing: the ownership of financial assets that, when linked to the public budget, can be used to finance expenses such as education, housing, health, and so forth.

These indications are essential for our reflection, in the final section, on the emergence of new drivers of financial accumulation and the continued erosion of the social model implemented in 1988. As a result, a shift in the quality of financial expropriation occurs: beyond operating through the appropriation of wage income via interest payments, it would now also operate through the creation of new asset classes designed to secure future income streams. For such a shift to take place, the de-universalization of social policies becomes indispensable. Once converted into property rights, these policies increasingly become assets that can be traded.

2 From Elitized Financialization to Mass Financialization

The Brazilian case offers a clear example of how financialization took hold in the periphery. Bruno et al. (2011) have shown that this process emerged early in Brazil, at the end of the 1970s, when banks and large firms began replacing productive investments with financial products. Since then, the trajectory of financialization in Brazil has generated distinct dynamics, each characterized by specific moments of expropriation.[4]

The first of these dynamics is referred to as 'elitized financialization'[5] (Lavinas et al. 2019) and gained traction between 1981 and 1994. Its antecedents trace back to the post-crisis period of the 'economic miracle' (1967-73), when compensatory mechanisms for past inflation were created, based on instruments designed to preserve the purchasing power of account holders and investors – at the time a tiny minority drawn from Brazil's upper middle class and economic elites.

With the advent of the monetary stabilization plan implemented throughout the 1990s, 'elitized financialization' was recalibrated by a new accumulation device that replaced the system of inflationary gains with one of high interest returns (Lavinas et al. 2019), using the Selic rate as its benchmark. By directing the path of financialization squarely toward the circuit of interest-bearing capital, the monetary

4 The concept of 'expropriation' refers to the contemporary debate on primitive accumulation and *Landnahme*, according to which the expansion of financial capitalism has increasingly depended on the commodification of previously non-commodified spaces and social groups through coercive political and institutional mechanisms. See Dörre 2015.

5 The term 'eliticized financialization' was first used in the literature by Becker et al. (2010) to refer to a different context, in which it described the initial stages of the financialization process in peripheral economies. In Brazil, all bank accounts and financial investments have their cash balances adjusted quarterly to account for past inflation – a procedure known as indexed money.

program of the time, built upon neoliberal macroeconomic principles, deepened the elitist character of the financialization dynamic by favoring high finance to the detriment of industrial accumulation. While this process reduced productive investment and economic growth, it simultaneously advanced rentier interests over public services and social security.

In this context, the nominal model of State and welfare embedded in the 1988 Constitution had to confront constraints on public investment, an austerity regime, the dismantling of the public pay-as-you-go social security system, labor flexibilization, and cuts to government spending, all of which signaled an intention to underfund the mechanisms needed to implement fundamental rights, particularly social rights. This required the triggering of a process of constitutional reform and mutation. The reform of the Brazilian State in the 1990s created the conditions for the emergence, during the first Workers' Party (PT) administrations, of a second dynamic of financialization, dubbed by Lavinas et al. (2019) as 'mass financialization'.

As a strategy of social inclusion, the welfare regime was redefined by emphasizing the provision of individual credit as a means of financing social reproduction. The volume of personal credit began to grow significantly and persistently from 2003 onward, thanks to the creation of specific credit lines (payroll-deductible loans and Brazil's federally funded student loan program, *FIES*), the relaxation of lending parameters, and other mechanisms designed to expand access to credit markets with the State acting as guarantor (Lavinas 2017, 2020). Undeniably, the expansion of the coverage and effectiveness of social assistance policy, previously limited to older adults and persons with disabilities (BPC), was the most successful dimension of the social inclusion and anti-poverty strategy with the creation of the paramount *Bolsa Família* Program (Brazil's conditional cash transfer program for poor families, widely regarded as a global benchmark in combating extreme poverty).[6]

However, despite the increase in social spending and the slight rise in the wage bill, social policy remained constrained by macroeconomic policy, with growing tax exemptions and revenue untying measures, operating in a pro-cyclical manner, except for 2010. As shown by Lavinas (2017), in that year, in response to the effects of the global financial crisis in Brazil, the government introduced quantitative measures that resulted in a strong growth rate of 7.6%, the highest in several years.

6 For more information on the trajectory of *Bolsa Familia* Program see `https://www.gov.br/mds/pt-br/acoes-e-programas/bolsa-familia`.

The central pillar of mass financialization, however, consisted of financial expropriation. This process developed globally, but in Brazil it was propelled by the strong expansion of credit and indebtedness during the first PT administrations. It presupposes, as Lapavitsas (2009) argues, that the advance of fictitious capital over industrial and commercial firms exposes the dominance of banks, which in turn seek compensation in workers' incomes as an alternative source of profit. As a result of privatizations and the underfunding of public services, meeting basic subsistence needs became increasingly dependent on bank financing. The wage-earning class, however, had no means to ensure predictability or control over the risks of borrowing. Under the appearance of accessing future income flows, the asymmetries of power and information between banks and poorer borrowers allow the former to appropriate part of wages through interest payments. As financial expropriation becomes a fundamental driver of banking profits, banks also begin to pressure the State to ensure the permanent expansion of consumer credit (Lavinas 2017).

In this context, one of the consequences of the ambiguous trajectory of the first PT era (expansion and commodification) was the sustained increase in the level of household indebtedness in Brazil. By December 2015, households had 40.57% of their disposable income committed to debts owed to the financial sector, compared to 16.51% in January 2005 (Banco Central do Brasil 2023a). Out of this process emerges a new and increasingly significant figure: the 'debt-poor' (Costa 2023), that is, those who fall below the poverty line as a result of the high share of household income devoted to debt repayment.

Anchored in access to consumer credit, complex financial arrangements were forged that enabled a permanent flow of interest-bearing capital. Among these, the (re)securitization of credit stands out. Although the extension of individual credit was presented as a factor of social inclusion, it nevertheless served as an instrument for globally disseminating neoliberal policies and for obscuring the unequal character inherent in speculative relations with the financial system, made possible through the collateralization of social policy. As put by Lavinas,

> the transformation of social policy into collateral reflects the breadth logic of financialized capitalism, which converts cash transfers, pensions, and other monetary schemes – sources of regular income streams, that is – into assets placed at the disposal of the financial sector. They are then used to service debt and generate new income streams […]. Through certain social policies – especially cash transfers paid by the state – the financial sector no longer has to rely on the requirement of liquid assets to offer credit to low-income groups and the poor. In this workaround,

> the State both exempts cash transfer recipients from posting collateral and provides the very collateral that is a precondition for the expansion of financial markets. (Lavinas 2020, 312-13)

In this process, modern finance has upended the logic of access to rights. Social policy in the form of entitlements – originally conceived of as a mechanism for decommodification – has been increasingly called upon to serve as collateral to access credit markets.

However, in 2017-18, the results of these measures proved discouraging, and economic recovery remained sluggish. Brazilian household income had shrunk by 7.6%, with 50.8% of disposable income committed to bank debts (Lavinas 2022). Unemployment stood at 12.4%. At the same time, the four largest private banks had reached the highest profit rates in their history, around R$ 53.9 billion.

Jair Bolsonaro, a former far-right military, was elected in 2018. Bolsonaro's autocracy (Singer 2022) proved well attuned to the conditions imposed by the financial market during the crisis that began in 2014, conditions that demanded greater rigor and broader social acceptance of austerity policies. It was able to generate such acceptance. It transformed radical conservatism into the dominant expression of discontent with expropriation, exonerating capital while creating false culprits through discriminatory practices grounded in an ideology of inferiority, an ideology that extends even to the most expropriated groups (women and Black Brazilians). With this, Bolsonaro autocratic project secured a highly controversial pension reform that raised the retirement age for women and the number of years of qualifying contributions; the aggressive reduction of public spending in areas such as education, science, health, and the environment; the granting of autonomy to the Central Bank; and the approval of the new legal framework for foreign exchange and international capital, an old demand of the financial sector aimed at facilitating the dollarization and internationalization of the portfolios of the Brazilian elite, which until then had been allocated exclusively in assets denominated in the national currency (Gonçalves, Lavinas 2022).

If this scenario somewhat weakened social support for *Bolsonarismo*, allowing Lula to win the 2022 election by a narrow margin, it was not enough to consolidate institutional forms or consistent movements in favor of the universalization of social policies, the Achilles heel of Brazil's social protection system.

On the contrary, Lula's third administration appears to be advancing an agenda that legitimizes a new wave of financialization, in which social policy becomes directly assetized. The discourse and modes of regulation surrounding the social sphere are now grounded in the idea of capitalization as the primary means of ensuring future welfare and protection. This points to a transition toward a model of social policy underpinned by the accumulation of property

rights over financial assets (Lavinas, Gonçalves 2024). In other words, beneficiaries, who were previously only recipients of social policies, are now expected to become holders of rights over future income streams. In doing so, Lula's third administration signals the inauguration of a third expropriatory movement: a deeper erosion of the universal dimension of social policies through the expansion of their ties to fictitious capital.

3 From Dismantling to Reconstruction

The return of a restructured *Bolsa Família* – the New *Bolsa Família* – which tripled the program's average benefit (to R$ 690.00 per month per family, with the addition of supplements that did not previously exist, starting from a base amount of R$ 600.00) and reached 21.45 million families, together with the reinstatement of the policy of real increases to the minimum wage, are the measures that immediately restore the foundational elements of Lula's third administration. This administration, in fact, effectively began at the end of 2022, with the approval by the National Congress of the Transition Constitutional Amendment (EC 32/2022), which authorized an increase in public spending during the government's first year.[7]

Other significant examples of reconstruction stand out in the field of food and nutrition security (SAN). The CONSEA (National Council for Food and Nutrition Security), which had been dismantled in 2019, was reinstalled for the second time, now supported by an Interministerial Chamber for Food Security. The PAA (Food Acquisition Program) was also reintroduced in 2023 after a long process of defunding, having been replaced in 2021 by the *Alimenta Brasil* Program, which had virtually no impact. The fight against poverty and the fight against hunger together once again resumed the priority they have always held on the PT agenda (Lavinas, Gonçalves 2024).

The federal government also relaunched the *Minha Casa, Minha Vida* program (PMCMV) (Fix, Paulani 2019; Fix et al. 2024) in July 2023, effectively burying its Bolsonaro-era replacement known as *Casa Verde e Amarela*.[8] The goal is to contract the construction of 2 million housing units for low-income populations by 2026. The program covers three household-income brackets, both in urban and

7 Restoration of R$ 168 billion to the 2023 federal budget.

8 This program is reported to have delivered 1.4 million low-income housing units between 2019 and 2022.

rural areas, and introduces several innovations compared to its first version, launched in 2009.[9]

The *Sistema Único de Saúde* (or SUS, 'Brazil's Unified Health System') has also begun a recovery process with the reinstatement of priority programs in several areas, including the expansion of primary care, the formulation of a National Policy for Specialized Care, the implementation of the national nursing wage floor with the recomposition of teams for programs such as *Saúde da Família* (the family health strategy, Brazil's primary-care delivery model) and *Mais Médicos* (which means 'more doctors', a program designed to expand medical provision in underserved areas), increased incentives for the philanthropic hospital network, and the reorganization of Indigenous health services.[10] All of this was made possible because, with the end of the federal spending cap (EC 95/2016) and the additional resources made available through the Transition Constitutional Amendment (EC 126), the government in 2023 reinstated the constitutional minimum for health spending, which since 2015 (EC 86) has required the allocation of 15% of the federal government's Net Current Revenue to the *SUS*.

Curbing – and ultimately reversing – this trend toward the dominance of profitable, financialized private provision in health care requires ensuring that *SUS* financing is based on the constitutional minimum, which introduces a contradiction within the implementation of the New Fiscal Framework. Complementary Law 200/2023, which enacted the new fiscal regime, may lead to increased pressure, beginning in 2025, to remove the constitutional earmarking of minimum funding levels for health – and likewise for education. This is because, as revenues increase over time, the amounts tied to the constitutional floors for these sectors will also rise, contradicting the New Fiscal Framework's rule that limits the annual growth of expenditures to a maximum of 2.5%. Yet the Framework cannot override the constitutional minimum (Funcia, Santos 2023), meaning it will almost certainly force reductions in other social expenditures that lack such guarantees. As a result, a struggle emerges over a compressed pool of social resources, a consequence of the austerity policy the government adopted through the new fiscal regime.

9 https://www.caixa.gov.br/voce/habitacao/minha-casa-minha-vida/Paginas/default.aspx.

10 https://www.gov.br/saude/pt-br/sus.

4 Reshaping the Links between Social Provision and Finance

On the side of innovations in the social sphere, several initiatives are noteworthy because they signal a change in direction. These include the *Desenrola Brasil* Program, the Brazilian Framework for Sustainable Sovereign Bonds, *Tesouro Educa+*, *Renda+*, and *Educa+Mulher*. Together with the renewed expansion of PPPs in both scope and scale, they point to a strategic shift in the design and financing of social policies.

The *Desenrola Brasil* Program aims to confront the disastrous effects of the financial inclusion strategy based on access to consumer credit that became the hallmark of the PT governments between 2003 and 2016, and that continued to intensify during the coronavirus pandemic, when the *Auxílio Emergencial* ('Brazilian's pandemic emergency aid') inadvertently facilitated, for the first time, a mass process of household debt renegotiation, thereby fueling a new cycle of debt expansion (Lavinas et al. 2022a).

This wave of debt renegotiation occurred at the time under the leadership of private banks and outside any coordinated state action, except for the *Conselho Monetário Nacional* ('National Monetary Council'), which authorized the five largest Brazilian banks to negotiate agreements with indebted and defaulting borrowers (Lavinas, Mader 2024).[11] The outcome is well known: despite high unemployment and widespread food insecurity during the pandemic, debtors and defaulters covered by the bailout rushed to the banks to settle their debts while the *Auxílio Emergencial* was in effect. As a result, delinquency rates and overdue payments (installments, store credit plans, etc.) fell by half (Lavinas et al. 2022a), only to be followed, subsequently, by a renewed upward surge in household indebtedness.

By mid-2023, as a reflection of the process of mass financialization through indebtedness, Brazil had 105 million people in debt vis-à-vis the financial system, while the number of high-risk debtors reached 15.1 million and delinquency rates were hitting successive record highs (Banco Central do Brasil 2023b). According to estimates from the economic team, at least 38 million people were in default and therefore unable to return to the credit market – a figure that could double, according to data from *Serasa Experian* (2023). The heavy leverage of households, combined with rising delinquency, had already been harming the profitability of the financial sector, which led banks, in the aftermath of the pandemic, to contract the supply of consumer credit (non-mortgage and non-earmarked lending),

11 Credit card and overdraft debts were excluded from this package.

responsible for 76% of interest-income generation (BCB, Relatório de Economia Bancária 2022).

The particularity of the *Desenrola Brasil* Program lies precisely in its focus on delinquency rather than on the very high overall level of household indebtedness. Those eligible for the program were individuals with overdue debts outstanding between January 2019 and December 31, 2022, and registered with credit bureaus.

The program – of particular interest to those listed as defaulters – was structured into two tiers. Tier 1 targeted delinquent borrowers with individual monthly incomes below two minimum wages, while Tier 2 was aimed at those earning between two minimum wages and R$ 20,000 per month. Tier 1 was expected to include around 21 million defaulters, and Tier 2 around 11 million.[12] Repayment may occur either in a lump sum or through bank financing in up to 60 months, with no down payment and minimum installments of R$ 50. In this case, as Lavinas and Mader (2024) note, the state assumes a significant share of the risk: in the event of renewed delinquency, it guarantees banks, via a guarantee fund, the repayment of the principal (as redefined through renegotiation), adjusted by the *Selic rate*. A ceiling of 1.99% per month was set for interest rates in Tier 1 debt restructurings, equivalent to 26.68% annually – more than four times the accumulated IPCA in 2023. In Tier 2, however, all risk is borne by financial institutions. That is, in contrast to Tier 1, the incentive for renegotiation in Tier 2 is purely regulatory: renegotiated debts generate 'presumed credit', reducing the minimum capital required for banks' asset exposures and thereby increasing liquidity (Lavinas, Mader 2024).

However, demand for debt restructuring fell short of the government's expectations, despite average discounts of 85%.

The *Desenrola* program was concluded in May 2024. The total volume of renegotiated debts reached approximately R$ 53 billion (less than the amount renegotiated by banks during the COVID-19 period) and benefited roughly 15 million defaulters, less than the initially projected target population in Tier 1. It has confirmed the hypothesis already put forward by Lavinas et al. (2022a) that the management of household debt is becoming part of the social policy toolkit in times of financialized capitalism. In practice, debt management backed by state guarantees stands at the forefront of the institutional redesign of social policy, signaling that one of the core drivers of mass financialization – indebtedness – requires renewed capacity to operate on a sustainable footing.

12 Debts excluded from the scope of renegotiation under Desenrola Brasil include all those backed by real collateral, as well as those linked to rural credit, real estate financing, and operations involving third-party funding or third-party risk.

Another unprecedented mechanism for financing social programs outside the regular budget is the Brazilian Framework for Sustainable Sovereign Bonds[13] (Lavinas 2025b). These bonds, aligned with the ESG agenda and the 2030 Sustainable Development Goals (SDGs) and developed with support from the World Bank and the Inter-American Development Bank, are intended exclusively for non-resident investors, and the resources raised will be earmarked for specific budgetary units defined in the LOAS, the organic law of social assistance. In other words, the initial plan to issue US$ 20 billion in green, social, and sustainable bonds introduces a new way of channeling resources to finance social policy, particularly the programs and sectors that constitute the prestige arc of the third Lula administration: social assistance (*Bolsa Família* program, etc.), food and nutrition security, education, diversity and empowerment (racial and gender), housing, and, of course, sanitation – which, under the new regulatory framework, places responsibility for universalizing access in the hands of private capital and institutional investors. This means incorporating into the budget the resources raised through bonds, with the government committing to allocate at least an equivalent amount to the policies and programs prioritized by investors.

Grounded in various resolutions adopted since 2020 by the Central Bank and the CVM, and aligned with the guidelines of the International Capital Market Association (ICMA) – a key source of legal certainty – the Framework sets out Brazil's obligations as issuer, as well as its commitment to disclosing quantitative and qualitative indicators for measuring environmental and social impacts. The document has already defined the target populations of the initiatives to be financed through the issuance of social bonds (Black Brazilians, community groups, persons with disabilities and the elderly, Indigenous peoples, underserved groups, etc.), suggesting a fragmentation of actions with a focused and segmented character. Eligible expenditures are also listed, including investments in tangible and intangible assets, as well as subsidies, credit lines, and tax exemptions.

It is too early to determine whether the Brazilian Framework for Sustainable Sovereign Bonds is merely an institutional marketing strategy – allowing the government to create a benchmark necessary for pricing private assets (the private ESG debt market in Brazil totaled R$ 238 billion as of September 2023, according to NINT),[14] as

13 https://cdn.tesouro.gov.br/sistemas-internos/apex/producao/sistemas/thot/arquivos/publicacoes/47810_2263017/anexos/21043_679338/Arcabouco%20Ingles%20v1%20(1).pdf.

14 Natural Intelligence, the largest ESG consulting and ratings firm in Latin America.

some suggest – or whether it is, in fact, yet another building block in the ongoing restructuring of the architecture and financing of social policy and the broader field of social rights.

The point is that it does not stand alone. It is one framework nested within other umbrella frameworks, such as the fiscal one, which impose strict adjustments on the social protection system and undermine universal rights. Bonds will also individually finance university education, which is treated not as a public responsibility but as a private financial obligation.

This is the promise of *Tesouro Educa+*,[15] a joint initiative of B3 and the *Secretaria do Tesouro Nacional* (STN, the 'National Treasury Secretariat'). Starting at a minimum of R$ 35 (6 USD) per month, and using a simulator that, unsurprisingly, projects entirely unpredictable future returns, one can choose among 16 investment options that "provide a monthly income to finance university studies or other educational goals your children may have in the future, guaranteeing gains above inflation for the savings accumulated". The citizen-investor concerned with their children's future education must establish in advance a present-value estimate of what they consider ideal to finance university costs after at least 15 years of saving. This alone already only seems feasible for a small share of families, given how university tuition is determined – ranging from distance-learning programs offered by more than 2,200 registered edtech platforms, financed by millions of dollars from institutional investors and private equity funds, to the extremely expensive elite medical programs that leading private hospital chains have incorporated vertically as part of their process of capital concentration and centralization. Those are chains that, moreover, share the same actors in their ownership structure.

The current return (01/2026) on *Tesouro Educa+*, with a 2041 maturity horizon (that is, 18 years), is IPCA + 7.90% per year. After years of regular, contractually defined contributions, and once the time comes to enter university, monthly income flows will be released over a five-year period to cover tuition payments. As specified on the *Tesouro Direto* website, "the more bonds you are able to purchase, the higher your future income to finance your children's university expenses will be".

By late 2025, around 159,300 people had invested in the *Tesouro Direto Educa+* program, although official figures for the total amount invested were not publicly detailed in available reports.

The *Renda+*[16] emerges as a new supplement to retirement benefits, adding yet another option to the logic of private pensions initially

15 https://www.tesourodireto.com.br/produtos/titulos/educa-mais.

16 https://www.tesourodireto.com.br/produtos/titulos/renda-mais.

consolidated by the 1998 Reform, a hallmark of the Fernando Henrique Cardoso administration. It is worth recalling that, as noted earlier, this privatizing logic was extended in 2003 to the civil service pension system when, in Lula's first term, a contribution and benefit ceiling identical to that of the general regime for private-sector workers was imposed, thereby encouraging the expansion of pension funds (both closed and open) and individual capitalization accounts. As the complementary pension regime expanded rapidly in the wake of successive reforms to the public system – which rendered it less attractive and continuously portrayed as being at risk, encouraging workers to shift their savings to private banks and pension funds – *Renda+* represents the newest building block in this architecture.

This bond, launched in 2023 through *Tesouro Direto* ('Brazil's platform for purchasing government bonds'), requires monthly contributions over a specified period before redemption becomes possible; redemptions do not occur in a single lump sum but are paid out over twenty years in monthly installments, adjusted for inflation plus a fixed rate (IPCA + 7.34% per year), and subject to the regressive income tax applicable to fixed-income investments. Early withdrawals incur penalties. Investments start from R$ 18 (USD 3). According to the government, this public bond is aimed at self-employed workers with estimated incomes between three and five minimum wages. The most recent data from the Treasury indicate that, by mid-2025, *Renda+* had approximately 320,000 investors.

It remains to be seen whether intermittent employment and income volatility – characteristic features of informality – will undermine the regular and uninterrupted contributions required for *Renda+*, as already occurs with public pensions and the MEI, thereby reducing the profitability of this investment.

In early 2024, *Educa+ Mulher*[17] was introduced, a bond specifically targeted at women, who remain underrepresented in the capital market yet are overrepresented among the indebted. Again, this is a bond aimed at low-income individuals, with a target population of women aged 16 to 75, especially single mothers. Its purpose is to help them cover their educational expenses. The return is indexed solely to inflation, with predetermined maturity dates. Investments start at R$ 35 (USD 6) per month. As with the other recently launched bonds, redemption occurs through monthly payments – here, over a period of 60 months.[18] A life insurance was added to *Educa+ Mulher*. BB

17 https://agenciagov.ebc.com.br/noticias/202401/educa-mulher-projeto-inovador-e-lancado-para-incentivar-mulheres-a-investir.

18 There are no official published statistics for '*Educa+ Mulher* investors' specifically by end-of-2025 from the *Tesouro Nacional*, *B3*, or *Banco do Brasil*.

Seguro de Vida Mais Mulher provides protection in cases of natural or accidental death and total permanent disability due to accident. It also offers support for women facing vulnerability or patrimonial violence, and a monthly food allowance for the family via a Food Card in the event of death.

A central innovation regarding PPPs is their extension into the social sphere. Finance Minister Fernando Haddad had already taken part in drafting Law 11.079/2004,[19] which introduced a new type of concession contract with private groups that provide infrastructure and services in exchange for remuneration from the public partner. In 2016, Decree 8.874 designated as priorities only those public–private partnership investment projects involving logistics and transportation works, urban mobility, energy, telecommunications, and broadcasting. This, however, was modified by the new Decree 11.498/2023, signed by Vice President Geraldo Alckmin and Haddad, which expanded the list of priority investment projects to include a range of social sectors, namely basic sanitation, irrigation, education, health, public security and the prison system, urban parks and conservation units, cultural and sports facilities, and social housing.

As a result, financial capital flows are able to expand not only into areas that had, in some way, resisted them, but also to exert even more direct influence over the conditions of social reproduction. This entails a significant shift in the modes through which accumulation is regulated, signaling a paradigmatic change (Romero, Van Waeyenberge 2020). PPPs developed especially under PT-led local administrations and their allies, introducing a new model of social entrepreneurialism aimed both at reorganizing urban infrastructure to reorient degraded territories toward the market (among others, Gonçalves, Costa 2020) and at restructuring the health sector. Under Lula's third term, this axis expands to encompass the social sphere in its entirety.

With this shift, the government has also expanded the ways in which it performs the role of guarantor for private business in the partnerships mentioned above. In April 2023, the National Treasury announced new measures to encourage PPPs that further strengthen the safety net and incentives for investors and firms to take on priority projects in the social sector. First, a federal guarantee funded directly by the Treasury was established to enable subnational governments to support operations with domestic and foreign financial institutions. The aim is for the backing of the federal government to increase certainty of repayment and thereby facilitate credit leverage. Constitutional funds (FPM, Municipal Participation

19 https://www.gov.br/secom/pt-br/fatos/brasil-contra-fake/noticias/2025/03/lei-federal-de-parcerias-publico-privadas-tem-20-anos.

Fund, and FPE, State Participation Fund) serve as collateral for public and private banks and may be triggered in the event of default by subnational entities.

As a result, 2023 recorded the highest number of concession and PPP calls for proposals ever published in Brazil – more than 340 by October, according to iRadarPPP (Exame 2023). This scenario shows that, with the New Fiscal Framework and the resulting constraints on public investment, the State has become fully dependent on PPPs to meet the expected financing needs of the social reproduction sphere. Lula's third administration aligns itself with the 'de-risking state model' (Gabor 2021). In this model, the pressure generated by austerity policies opens space for PPPs, requiring a shift in the institutional framework to establish a safety net for investors and the firms responsible for delivering social infrastructure.

Such innovations signal the centrality of finance as it advances into the forefront of social provision. This means that social policy, once conceived as a mechanism of emancipation, loses ground, since the logic of capitalization rests on valorization imperatives that have been able to materialize only through future expropriations.

5 By Way of Concluding Remarks

The conflict between reconstructive dynamics, those that reactivate the institutional framework of the 1988 social protection system, and innovative dynamics, as defined in this article, which expand the reliance on capitalization as a promise of future income detached from the social budget, reveals more than contradictions: they mark divergent and antagonistic paths that cannot be conceived as complementary. The very existence of the New Fiscal Framework expresses the impossibility of harmonizing the two competing paradigms. Shielding the recomposition of the social budget by imposing constraints on expenditure growth – constraints that ensure it remains well below revenue growth – is precisely what enables the financial system to capture social demand. Much is said today about "including the poor in the budget", a budget that has been deliberately constrained. Yet few seem to recognize that these same people are increasingly being pulled into the spreadsheets of banks, through debt, and now also into financial circuits in which they are newcomers and exposed to the risks and uncertainties of deregulated and speculative markets. Not to mention that social provision is progressively displaced from the public budget whenever the fulfillment of reproductive needs is redefined as a matter of private property rights.

Taken together, these dynamics call for a rethinking of the conditions and mechanisms through which contemporary

inequalities are reproduced. To date, such mechanisms have been primarily approached through economic measures designed to capture variations in income levels or labor remuneration (Piketty 2015). Sociological literature, in turn, has emphasized processes of accumulation and appropriation of symbolic capital and cultural goods, highlighting the production of dominant representations to which social actors are compelled to conform (Bourdieu 1986). Both perspectives, however, tend to understate the central factor emphasized here: the mobilization of existing forms of property and their potential to be transformed into assets capable of generating future income.

Decades of privatization, fiscal austerity, and the expansion of access to credit have profoundly reshaped the operating logic of social policies, rendering them increasingly dependent on individualized and private forms of financing. In effect, beneficiaries are required to finance their own well-being. Among dispossessed classes and groups, precarious forms of property and even social rights are converted into opportunities for borrowing or asset creation within the financial system, mobilized to meet basic reproductive needs. This subordination to interest rates and market risk intensifies pressures toward surplus labor, as households adapt to a new expenditure regime. Financial expropriations of income and assets thus consolidate a cycle in which individual private property, posited as a condition of well-being, becomes a driver of indebtedness and precarization. It is increasingly through this configuration that contemporary inequalities are expressed.

The financialization of social policy appears to be acquiring new contours, rather than having its reproductive dynamics weakened or reversed under Lula's third administration. Indeed, the government has made efforts to rebuild programs and policies that were at the center of the storm during the Temer-Bolsonaro years, having suffered erosion and discontinuity. At the same time, however, it has introduced new formats of social provision that share a common feature: expanding and multiplying – through the creation of new classes of assets – the forms of financial expropriation that spare neither the working classes nor, in particular, the subproletariat. In this way, the government combines strategies of reconstruction with strategies of deconstruction, the latter expressed in the assetization of social rights now transformed into property rights, thereby eroding the social model enshrined in the Brazilian 1988 Constitution.

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The Social Precarization of Labor and Inequalities among Workers in Brazil

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Abstract This article examines the current social precarization of labor in Brazil, its main and diverse manifestations within the broader transformations of contemporary capitalism. The central thesis is that, in this context, what intersects the power of finance, neoliberal policies, globalization, and the permanent restructuring of production is the social precarization of labor as the core dynamic of the system, both in central and peripheral countries. The first section discusses the current stage of flexible accumulation; subsequently, the historical specificities of labor precarization in Brazil are analyzed, followed by the presentation of some indicators of this precarization in the present conjuncture. From these, the article engages with intraclass inequalities and the struggle to reduce working hours in the current context.

Keywords Labor. Social Precarization. Inequalities. Working Hours. Brazil.

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1 Introduction

This text aims to discuss the current social precarization of work in Brazil, its main and different manifestations, in the context of the transformations of contemporary capitalism, analyzing the changes in the forms of labor regulation in Brazil, based on the neoliberal offensive, which intensifies inequalities between and within classes, and suggests that the recent struggle to reduce working hours is one of the most important social movements of resistance and confrontation against the offensive of capital.

The central thesis is that, in this context, what intersects the power of finance, neoliberal policies, globalization, and the permanent restructuring of production is the social precarization of labor, which constitutes the core dynamic of the system both in central and peripheral countries.

The concept of the social precarization of labor, which contributes to the deepening of social inequalities, can be succinctly outlined through the following points: i) it is a strategy of capital domination at a specific historical juncture, combining the crisis of Fordism and welfare states, the financialization of the economy, neoliberal policies, and the productive restructuring, which together constitute a new regime of flexible accumulation (Harvey 1990); ii) it is not merely a result of labor flexibilization, as asserted in many studies; because flexibilization and precarization are synonyms; iii) it is a global process, albeit marked by distinct national historical specificities, and it is also a form of precarization that has become generalized with different speeds across all regions and among all different segments of workers; accompanied by an institutionalization of instability and inequality (Appay, Thébaud-mony 1997); iv) these transformations in labor reverberate across the broader fabric of social life, affecting the family, education, leisure, and restricting the access to public goods, most notably health and education (Hirata, Préteceille 2002); v) precarization is not confined to the sphere of the labor market (contracts, occupational insertion, wage levels), but extends across *all* domains: the processes and organization of work, the conditions of labor and workers' health, the realm of rights, the forms of resistance and struggle, and the role of the State (Druck 2020).

Precarious labor, in its multiple dimensions (in forms of insertion and contracting, informality, outsourcing, platformization, the deregulation and flexibilization of labor legislation, unemployment, illness, workplace accidents, wage loss, union fragility, and long and extensive working hours), is reconfigured in ways that affect the entire class dependent on labor (Antunes 1999), while simultaneously fragmenting it.

The research methodology adopted a qualitative approach, using historical materialism as a theoretical and methodological framework

and employing various collection and analysis techniques, such as literature review and documentary research.

The article begins by addressing the dynamics of flexible accumulation, then turns to the historical specificities of labor precarization in Brazil, showing a few indicators of this precarization in the current conjuncture, from which intraclass inequalities are analyzed, ultimately underscoring the centrality of the struggle for shorter working hours in the present context.

2 The Current Stage of Flexible Accumulation: Precarization as a Strategy of Domination

In the present historical conjuncture, labor takes on a configuration that has held global hegemony for at least five decades. This era is marked by an unprecedented globalization of capital under financial hegemony, anchored in a neoliberal political-economic project, and materialized through the ongoing restructuring of production and labor.

Throughout the history of capitalism, different patterns of accumulation have been established, shaped by a constellation of economic, social, and political factors most notably the struggles of workers' resistance, which imposed limits on accumulation, redefined and implemented social and labor rights, and fostered the acceptance and legitimation, by both society and the State, of social protection as a right to be guaranteed.

These are historical conjunctures that act upon the structural conditions of the system, modifying them and reshaping its forms and configurations. They are, therefore, moments that synthesize specific relations of forces arising from the actions of social classes, whose experiences also vary historically. In short, the point is that nineteenth-century capitalism cannot be equated with that of the twenty-first century.

The passage from one historical era to another reveals transformative processes wherein older and newer forms of labor and employment coexist, intertwine, and are redefined, producing a metamorphic movement that, in the present conjuncture, occurs under the aegis of a dynamic that now predominates over others: the dynamic of the social precariousness of work.

In the age of flexible accumulation and the hegemony of neoliberalism, the rupture with the Fordist model engendered new modes of labor and life, organized through flexibilization and precarization as imperatives of economic financialization, thereby facilitating a globalization of capital unprecedented in scope. The ascendancy of the financial sphere has come to dominate all economic action of capital, subordinating productive practices and labor

management. Anchored in a reconfigured State that increasingly functions as the 'manager of bourgeois interests', this dynamic advances the deregulation of markets – most notably financial and labor markets as its central project. It is the neoliberal maxim of absolute corporate freedom, whose principles are based on the defense of a market economy society as meta-historical, whose values emanate from human nature and cannot be violated by the actions of the State (Harvey 2014; Basso 2003; Druck 2011).

According to Castel (1998), the precarization of labor constitutes a central element in the new dynamics of capitalist development, producing a novel condition of social vulnerability. This process transforms the conditions of stable wage labor that were previously hegemonic during the so-called wage-earning or Fordist Society. The loss of employment, or of stable occupational insertion, generates insecurity and precarious modes of life and work – both objectively and subjectively – thus creating mass vulnerability, a weakened social condition or 'social *disaffiliation*', which intensifies social inequalities on a global scale. In the words of Sennett (1999), "flexible capitalism" corrupts social ties – the character – leaving individuals "adrift".

To assert that the social precarization of labor lies at the center of the dynamics of flexible capitalism also means to understand it as a strategy of domination. That is, force and consent are the resources capital employs to enable this degree of accumulation without material or moral limits. Force is manifested primarily in the imposition of precarious labor and employment conditions, sustained by the ever-present threat of structural unemployment intrinsic to capitalism.

What Marx and Engels (1971) elaborated regarding the principal political function of the industrial reserve army applies here in a generalized form: namely, to generate profound competition and division among workers themselves and, thereby, to secure an almost absolute submission and subordination of labor to capital as the sole means of survival. Consensus emerges at the moment when workers, influenced by their political and trade union leaders, come to believe that transformations in labor are inexorable and, as such, are justified as the expression of a new epoch or of a 'new spirit of capitalism.'

This 'new spirit' delegitimizes the values of the preceding era, eroding faith in progress, durable employment, social rights, and the mitigation of inequality. Under the banners of the 'single path' and 'single thought', it enforces transformations that are rationalized, materially and ideologically, as unavoidable.

In Bourdieu's words (1998), this transition rests upon flexibility as a 'strategy of precarization', inspired by economic and political rationales, the product of a 'political will' rather than an 'economic fatality' supposedly dictated by globalization. Precarization is conceived as:

> a political regime […] inscribed within a new mode of domination, founded on the institution of a generalized and permanent situation of insecurity, aimed at compelling workers to submission and to the acceptance of exploitation. (Bourdieu 1998,124-5)

This regime is the outcome of political will – active or passive – rather than the 'inflexible laws' of an economic order. It reflects deliberate choices aimed at securing the ever-expanding domination of labor and workers.

These formulations reveal a phenomenon at once old and new: the market fetish, which unfolds in different expressions, such as the fetish of flexibilization. This entails the autonomization of economic imperatives from social and labor relations, producing an inversion of subject and object. Flexibilization thereby governs subjectivity as an external force, depriving individuals of the capacity to resist or reclaim control over social processes.

Within the current conjuncture of capitalism – marked by flexible accumulation and a political regime grounded in precarization – the aim is to understand, in concrete terms, the specificities and singularities of each country or region.

In Brazil and across Latin America, the dynamics of labor precarization share the same structural nature, yet their generalization assumes a distinct trajectory: only a small fraction of workers ever secured relative stability. In other words, social vulnerability and inequality have historically remained profound, encompassing wide sectors of the working class.

3 The Historical Specificities of the Social Precarization of Labor in Brazil

To understand the specificity of the Brazilian case, it is necessary to refer to its history: a colonial country grounded in slave labor, specialized in an agrarian-export economy, and whose late industrialization, through the import-substitution model, condemned it to a subordinate position regarding central economies. This trajectory characterized the specificity of capitalism in Latin America and gave rise to different interpretations of the center-periphery relationship or of development versus underdevelopment.

It is considered that the global development of capitalism unfolded in an uneven and combined manner, creating an international division of labor in which the former colonies, such as those in Latin America, became dependent countries, exporters of raw materials, while industrial dynamics and technological matrices advanced in the central nations. This was a heterogeneous process both among the central countries and among peripheral ones. In the case of Brazil,

industrialization, though late, rendered the economy more complex and dynamic, with the establishment of major durable consumer goods industries, thereby differentiating its productive structure from that of other Latin American countries (Druck 2023).

Examining labor transformations in Brazil under financial globalization and neoliberalism requires acknowledging the absence of a Welfare State. What emerged instead was a social protection regime codified in the 1943 Consolidation of Labor Laws (CLT), tightly bound to state control of unions, and limited to the urban sector. While limited, these rights, demanded by workers since the 1930s, represented a significant advance towards the 'wage condition' discussed in studies of the European experience.

Unlike in the more developed countries, the 'wage condition' was never fully achieved in Brazil, though it was strongly desired and pursued through social struggles, serving as a political inspiration for critiques of Brazil's 'wild capitalism.' In this sense, the 'capitalist spirit' of the Fordist model of development and regulation – which fostered a period of prosperity and social progress in those countries – was, in a certain way, claimed or sought as a path to overcoming the conditions of inequality, misery, poverty, underemployment, and 'social malaise' in our country.

It is also from this perspective that the advances enshrined in the 1988 Constitution stand out, expanding certain rights, consolidating others already in place, and creating new universal public policies – for example, universal retirement for rural workers and the Unified Health System (SUS), which incorporated occupational health as part of public health, as well as the reduction of the workweek from 48 to 44 hours. Nevertheless, the difficulties in implementing these achievements soon became evident in the context already emerging in the early 1990s: the neoliberal project, victorious in the 1989 elections, contradicted fundamental principles of the new Constitution.

This was the period of capital restructuring that began in the late 1970s, reaching Brazil and receiving favourable political reception from its rulers, who, through economic policies, reinforced the liberalization of capital and deepened the country's subordinate position within the ongoing financial globalization. The struggles of workers and their trade union and political organizations, which had managed to delay or even block neoliberal policies during the 1980s, weakened and lost their capacity to contend in defense of alternative political projects.

In the current Brazilian historical moment, it can be argued that labor precarization has emerged as a new phenomenon, whose main characteristics, modalities, and dimensions suggest an unprecedented process of social precarization and management, in the dynamics of the fourth technological Revolution, in labor and social legislation, in the role of the state and its social policies, in the behaviour of

trade unions, and in the new modes of action of public institutions and civil associations.

The character of this new social precarization of labor rests on the idea that it is a process which – economically, socially, and politically – institutes the modern precarization of labor on a global scale, renewing and reconfiguring the historical and structural precariousness of labor in Brazil. It is now justified – within the capital-dominated perspective – by the supposed necessity of adapting to new times, marked by the inevitability and inexorability of a worldwide process of precarization, also experienced by the developed countries. Thus, the reference point for peripheral nations is no longer the Fordist citizenship or the wage condition of those countries, but the flexible and global capitalism as the 'only path' to modernity in the contemporary world.

This social precarization of labor is new because it has been reconfigured and expanded, leading to social regression in all its dimensions. Its scope and generalization can be identified insofar as it affects both the more developed regions of the country, such as the Southeast, and those more traditionally marked by precariousness, such as the Northeast; it is present both in the most dynamic and modern sectors of the country – in cutting-edge industries employing digital technologies – as well as in the more traditional forms of informal, self-employed, and autonomous work. It affects both highly qualified and less qualified workers alike, and extends across the private and public sectors, in both urban and rural areas.

4 The Social Precarization of Labor in Brazil: Some Indicators of Inequalities

In the current configuration of the Brazilian labor market, according to Instituto Brasileiro de Geografia e Estatística (IBGE 2025)[1] data for the second quarter of 2025, the employed population was composed of: 69.5% employees, 4.1% employers, 25.2% self-employed workers,[2] and 1.2% contributing family workers. There are approximately 32.5 million Brazilian workers who are either self-employed or employed in the private sector without a formal labor contract, representing

1 IBGE – Brazilian Institute of Geography and Statistics – official agency of the Brazilian federal government, subordinate to the Ministry of Planning and Budget, responsible for the production, analysis, research, and dissemination of statistical information – demographic and socioeconomic, and geoscientific – geographic, cartographic, geodetic, and environmental.

2 The IBGE defines a self-employed worker as "a person who works running their own business, alone or with a partner, without having employees and with or without the help of unpaid workers who are members of the household in which they live".

31.7% of the country's 102.5 million employed persons. This situation already reflects the high degree of informality and the absence of labor rights.

Moreover, according to IBGE, the average weekly working hours of self-employed workers is 45.3 hours, well above the national average of 39.1 hours worked per week across the workforce. Regarding earnings, self-employed workers receive the lowest incomes: on average R$ 2,600 per month, while employees earn R$ 3,100 on average and employers R$ 8,200 per month. In summary, these figures reveal a scenario of social precarization of labor and inequalities among workers themselves – in their forms of insertion, working hours, and remuneration. These are structural conditions of the Brazilian labor market, and are subject to change, reflecting conjunctural movements and transformations in labor legislation and technological innovations.

The 2017 labor counter-reform imposed the withdrawal of rights established in the CLT, as an expression of the neoliberal offensive and part of an international movement aimed at removing the limits on labor exploitation by capital. The changes in labor legislation institutionalized precarization as the norm, declaring the end of workers' legal vulnerability protections, and placing at risk the very existence of Labor Law by hollowing out the Labor Courts, restricting access to them, and relegating them to the mere role or ratifying negotiated agreements over statutory provisions. (Dutra, Machado 2021; Teixeira et al. 2017)

Following the enactment of Law No. 13.467/2017, it becomes evident that both old and new forms of precarious employment have been validated or instituted. The range of precarious contractual arrangements is extensive, encompassing intermittent work, the expansion of possibilities for part-time employment, telework, outsourcing, self-employment, among others.

In the wake of this counter-reform, currently under review by the Supreme Federal Court (STF), Brazil's highest judicial authority, the legality and boundaries of *pejotização* – that is, the replacement of formal employment contracts governed by labor law (*carteira assinada*) with contracts under the status of Legal Entity (PJ) – are being examined. This practice, already underway in the country, has been adopted by companies as a strategy to circumvent the costs associated with labor rights that remain in force under the Consolidation of Labor Laws (CLT).

According to IBGE (2022), of the 5.5 million employees dismissed from companies, 4.4 million became Individual Microentrepreneurs

(MEIs),[3] with many continuing to provide services to the same employer. This reveals a clear case of labor fraud.

In October 2025, a public hearing entitled "Economic and Social Challenges of '*Pejotização*' in Brazil" was held at the Supreme Federal Court (STF 2025). Out of 500 requests to participate, the reporting justice authorized 48 participants, including individuals, legal entities, representatives of employers, workers, and public authorities. At this hearing, labor scholars (including economists, sociologists, lawyers, and jurists), together with representatives of trade unions and public authorities, presented the implications of a Supreme Court decision that could authorize the unrestricted adoption of *pejotização*. This practice entails hiring workers as registered Legal Entities (*Pessoas Jurídicas*), thereby classifying them as "companies", which would result in the loss of remuneration and benefits tied to formal employment contracts, such as: the thirteenth salary, paid vacation, Severance Indemnity Fund (FGTS), overtime pay, night-shift premiums, severance payments, maternity leave, sickness benefits, among others. The loss of entitlements would result in a reduction of workers' disposable income estimated at no less than 20%. This calculation considers only the amounts related to FGTS, vacation pay, and the additional one-third vacation bonus that workers subject to *pejotização* would forfeit. (Welle, Petrini 2025)

> In the same study, the economic and social implications of this liberalization are examined, highlighting the losses incurred by both workers and society. Several outcomes of *pejotização* are emphasized, such as the removal of the principal flow of resources for financing social security; the complete flexibilization of hiring and dismissals; the elimination of the minimum wage as a benchmark for labor remuneration; and the withdrawal of rights including the thirteenth salary, paid vacation, FGTS, higher-level retirement benefits, and unemployment insurance. According to Welle and Petrini:…unrestricted *pejotização* increases unemployment, reduces wages, slows economic growth, heightens economic volatility, and exacerbates wage inequality among workers. (2025, 17)

3 Individual Microentrepreneur – The Individual Microentrepreneur (MEI) is a legal entity established by the National Statute for Micro and Small Businesses, which formalizes informal entrepreneurs who work for themselves as small business owners, allowing them to become microentrepreneurs and thereby enjoy greater constitutional guarantees. The formalization of the MEI guarantees a CNPJ (Corporate Taxpayer ID), making it possible to obtain some benefits of a Legal Entity, including the use of special lines of credit, social security rights, sickness benefits, among others.

This new labor counter-reform, which may be defined by Brazil's Supreme Federal Court (STF), will enable capital to detach itself not from labor itself – since that would imply its own demise – but from the condition of the worker. By no longer recognizing individuals as labor power employed in production – whether industrial, commercial, or service-oriented – they come to be formally regarded as "entrepreneurs of themselves". Consequently, their contracts will be governed by civil and commercial law rather than labor law.

Such a process is already underway in the country, generating a significant volume of cases before the Labor Courts and the Supreme Federal Court. These actions seek recognition of the employment relationship and the payment of labor rights, as they demonstrate the subordination of workers to employers who circumvent labor legislation using *pejotização*.

Concomitant with this situation in the sphere of state regulation of labor, another transformation has been driven by the digital revolution through the use of new Information and Communication Technologies (ICTs). These technologies have established a new form of work organization adopted by companies, which aligns with the same objectives as *pejotização*: the denial of the condition of the salaried worker. This phenomenon is referred to as "uberization". The use of digital platforms has spread across numerous professional activities, most notably among delivery workers and drivers. In Antunes's (2018) view, they constitute the new service proletariat. The fundamental nature of this form of work lies in the absolute denial of the wage-earning condition of workers, as it establishes them as autonomous service providers. Digital platforms present themselves merely as technical intermediaries, facilitating a connection between these self-employed individuals and clients. Under the fetishization of technology, companies seek to conceal the underlying labor and production relationship, refusing to acknowledge any employment bond, while perversely transferring all costs of the means of work onto the workers themselves.

Beyond this objective condition of labor organization, there is also a political effort by capital under neoliberal hegemony, marked by the dissemination of the ideology of entrepreneurship. This has led some app-based delivery workers to refrain from identifying as workers, instead perceiving themselves as "entrepreneurs of themselves", believing they possess autonomy to define their work and working hours in the capacity of self-employed individuals. Such a 'belief', however, collides with the concrete reality experienced by these workers.

A recent IBGE (2025) survey on "platform-based workers" reveals that the average number of hours worked per week is 44.8, which is 5.5 hours longer than that of other employed individuals. It was found that 55.8% of app-based drivers (excluding taxi applications) and 50.1% of delivery workers had their working hours influenced

by incentives, bonuses, or promotions that alter pricing. More than 60% of individuals working through service applications were not covered by the National Institute of Social Security (INSS). Earnings vary according to educational attainment: those with a completed higher education earn 29.8% less than other employed workers, while those with lower levels of education earn up to 40% more than other employed workers. It should be noted that the income of platform-based workers corresponds to a "piece-rate wage", insofar as they are paid per ride or per delivery. This partly explains the constant rush of motorcyclists and cyclists (more visible on the streets) and their exposure to risks and accidents, including fatal ones.

5 Inequalities Within the Working Class

The labor indicators referenced above in official statistics, together with a wide range of studies on recent transformations in the world of work – particularly those that synthesize a dual offensive of capital, both in the sphere of labor legislation and in new forms of work organization through digital technologies – demonstrate that the social precarization of labor is becoming generalized, albeit in an unequal and hierarchical manner.

Beyond the structural inequalities of gender and race reflected in all indicators of the Brazilian labor market, these recent transformations reveal a scenario of heightened precarization among self-employed workers, who lack any form of social or labor protection, as the data attest. Should *pejotização* be declared legal by the Supreme Federal Court (STF), it would amount to the constitutionalization of fraud, removing any limits on companies replacing formal CLT employment contracts with PJ arrangements.

Nevertheless, other dimensions of labor precarization have also been observed among "formal workers", that is, those with registered employment contracts. This has been revealed, for example, in studies on outsourcing in both the private and public sectors, which demonstrate the inseparability of outsourcing and precarization across all dimensions: in precarious hiring arrangements established for increasingly shorter fixed periods with high turnover; in working conditions; in remuneration; in working hours; in occupational health; in trade union representation; and in labor rights.

Outsourced workers earn less, work longer hours, have fewer rights and benefits, experience higher turnover and greater job instability, receive less training and skill development, and have fewer safety equipment provisions. They suffer more accidents and fatalities, and their numbers are increasing at a faster rate than

those of directly hired employees.[4] Outsourcing anticipated what subsequent labor reforms imposed upon the workforce as a whole: the institutionalization of precarization as the norm. It intensifies competition among workers, since beyond reducing costs and transferring responsibilities for the employment relationship to a third party, employers pursue a political objective by provoking the fragmentation of labor collectives, fostering division and discrimination among workers by classifying them as first- and second-tier categories. This process leads to the dispersion of trade unions, as workers within the same productive unit may be represented by multiple unions, thereby undermining their unity and weakening their struggles (Druck, Basualdo 2022).

Within the sphere of "formal workers", another dimension of precarization has historically been a central issue for the working class: long working hours. In Brazil, the eight-hour workday was only instituted in 1932 and enshrined in the 1934 Constitution, with six working days per week – thus, 92 years ago. The Consolidation of Labor Laws (CLT), created in 1943 and limited to urban workers, incorporated the forty-eight-hour workweek.

In the 1988 Constitution, although the labor movement had advocated for a forty-hour workweek, the standard working time was reduced to forty-four hours. Nevertheless, numerous loopholes in the legislation effectively allow this limit to be circumvented, such as the 6x1 schedule – six consecutive days of work followed by one day of rest – which remains prevalent, particularly in the commerce and service sectors.

According to an analysis conducted by DIEESE (2025), the 2017 "Labor Reform" modified legislation in ways that facilitated the extension of working hours through the following provisions: (i) elimination of the requirement that competent authorities authorize the extension of the standard eight-hour workday to twelve hours in unhealthy or hazardous activities; (ii) the normalization of the ten-hour workday (eight hours of work plus two hours of overtime), which ceased to be exceptional with the removal of the obligation for a written agreement to implement the habitual two daily overtime hours; and (iii) the introduction of permission for individual agreements to establish time banks of up to six months, thereby excluding the requirement of collective agreements or conventions. In cases of compensation within a thirty-day period, no written formalization of the agreement is required. (iv) The reform also excluded from the calculation of working hours the commuting time to the workplace (*horas in itinere*), even in companies with extensive territorial

4 See Krein 2016; Biavaschi, Teixeira 2015; Droppa, Biavaschi 2014; Marcelino 2004; Dau et al. 2009; Druck, Basualdo 2022.

dimensions, such as those in agriculture or mining. Consequently, working time came to be counted only from the exact moment the worker begins the labor activity, resulting in lower remuneration for those who spend minutes or even hours traveling within the company premises. (DIEESE 2025, 5-6)

In addition to these legislative changes, there has been an expansion of precarious contracts such as intermittent and part-time work, which flexibilize working hours, as well as the liberalization of unrestricted outsourcing and the hiring of self-employed workers, all guaranteed by the reform. These arrangements are characterized by longer working hours and the extensive use of overtime. In summary, one of the central indicators of labor precarization – affecting the entire working class – has become a key issue that unifies workers within a context of growing inequalities.

6 The (Recent) Struggle for Reduction Working Hours in Brazil

In the history of the struggle for the reduction of working hours, the bourgeoisie and its spokespersons have consistently resisted, portraying a chaotic scenario for the economy and predicting dramatic increases in unemployment and the closure of businesses. This pattern of behaviour dates to colonial Brazil, when large landowners and slaveholders opposed the abolition of slavery, forecasting the collapse of coffee production and a *debacle* of the national economy. A similar reaction occurred more recently with the extension of labor legislation to domestic workers. History has shown that the predictions of the Brazilian bourgeoisie, in all these moments of workers' achievements, did not undermine the economy or the process of capital accumulation. (Filgueiras, Druck 2024)

At the present moment in the country, as a (new) movement emerges advocating for the reduction of working hours and against the 6x1 schedule (six days of work for one day of rest), the same reaction of the dominant classes is repeated: claims that the Brazilian economy will not withstand it, that small business owners will "go bankrupt", that unemployment will skyrocket, and that the prices of goods and services will rise.

Despite these resistances, a Proposed Constitutional Amendment (PEC-8/25), introduced by Deputy Erika Hilton, obtained more than 200 signatures from representatives across diverse political parties, and was formally submitted to the National Congress. This outcome was made possible by a campaign launched both on social media and in the streets, initiated by a worker who is now one of the most-voted city councillors in Rio de Janeiro, Ricardo Azevedo (Rick). He first gained public recognition while working in a pharmacy, when he produced a

video expressing frustration over the 6x1 schedule (six days of work for one day of rest), denouncing the modern slavery to which workers were subjected, and calling upon everyone to fight for a "Life Beyond Work" (*Vida Além do Trabalho*, VAT). This expression gave its name to the movement sparked by his appeal on social media, which went viral and transformed Rick, as he is known, into a digital influencer.

Although this claim for a Life beyond work, was launched through social media, it also moved into the streets. Rick began to gather not Only "followers" but also workers who started to participate in demonstrations and leaflet distributions held in shopping centres, pharmacies, public squares, and neighbourhoods. From 2023, When the video was released, up to the present, the call for Life Beyond Work (VAT) has consolidated itself as a national movement active in Brazil's major cities, bringing together primarily young workers. Their reality is marked not Only by the highest unemployment rates (14.3%) but also by the fact that 72.8% of employed youth between the ages of 14 and 29 worked 40 hours or more per week in 2021, making it impossible to reconcile study and work.

The movement emerged outside traditional organizations, such as trade unions or political parties, which were slow to join the VAT campaign – only beginning to do so in 2025, and even then, in a hesitant and reluctant manner. It was also in that year, during the May 1st celebrations, that President Luiz Inácio Lula da Silva declared the importance of the struggle against the 6x1 schedule, which encouraged other union leaders to speak out and support the constitutional amendment (PEC) under consideration in the National Congress. The proposal seeks to replace the schedule of six days of work followed by one day of rest with a four-day workweek and three days of rest, without salary reduction. It has already gathered more than three million signatures. (Pereira, Pereira, Santos 2024)

Brazil has one of the highest annual working hours in the world. According to an OECD (2023) survey, Brazil ranks fourth among 46 countries considered, with an annual average of 1,936 hours worked. Mexico occupies first place with 2,128 hours, followed by Costa Rica with 2,073 horas, and Colombia in third with 1,964 annual hours. At the other end of the spectrum, Germany records the lowest figure with 1,349 annual hours, followed by Denmark with 1,363 annual working hours.[5]

The struggle against the 6x1 schedule and for the 4x3 workweek without wage reduction, proposed as a constitutional amendment, although formally directed at workers with registered contracts,

5 For an analysis of the working day in Brazil and recent struggles, see the dossier organized by Cesit/Unicamp, Site DMT, Remir, GEPT/UNB, and FCE/UFRGS, available at https://www.dmtemdebate.com.br/category/dossie-fim-escala-6x1/.

extends beyond these segments, reaching all those who aspire to a "life beyond work". Thus, the necessary reduction of working time also applies to those in informal employment, many of whom endure a 7x0 schedule with no weekly rest, serving as a reference point for rethinking their working and living conditions and encouraging new mobilizations. Moreover, with the reduction of working hours, new workers could be hired, thereby decreasing informality. In this sense, it is a struggle that provides unity to a fragmented working class – divided by competition, marked by inequality, and heterogeneous – bringing together men and women, Black and white, employed and unemployed, formal and informal, outsourced and non-outsourced, ultimately enabling a common agenda that unifies the class-that-lives-from-work (Antunes 1999).

7 Final Considerations

Inequalities between and within classes have been produced by forms of expropriation and exploitation of labor in capitalism since its beginnings. In contemporary times, the metamorphosis of labor relations has led to unprecedented precariousness, the result of the neoliberal offensive around the world. One of the main indicators of this process – determined by financial logic, sustained in the very short term, which has contaminated all types of work and life, subordinated to information and communication technologies – is the increase in working hours and their intensification.

The class dispute in the capital-labor relationship is a struggle for control over time – both working time and free time. According to Marx (1971), the working day is a variable quantity, consisting of the time necessary for the reproduction of the worker and for the production of surplus value. The reduction of the working day without a reduction in wages directly affects the extraction of surplus value and is, therefore, a preliminary condition for an emancipated life.

Currently, there is a counteroffensive by workers in several countries around the world, expressed in the approval of legislation or specific experiments that have reduced working hours, as is the case in Germany, Spain, the United Kingdom, Portugal, Belgium, Colombia, and more recently in Mexico.

In Brazil, as mentioned above, there is a strong, independently organized movement underway, with growing mobilization in the streets and on social media, called *Vida Além do Trabalho* (Life Beyond Work, VAT), which has managed to influence other trade unions and political parties, as well as already having significant representation in the legislative and executive branches.

These are counter-hegemonic movements which, even if limited to new regulations on working hours in the Brazilian case, the end of

the 6 X 1 working day, go against the grain of labor reform and the precarization of work and open the way for reflection, beyond their immediacy, on self-control over working time and life time, with a view to building another form of sociability.

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Class Conflict and Rising Inequalities
How the Bourgeoisie United to Secure Approval for Labor Reform in Brazil

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Abstract The article analyzes the action of the Brazilian industrial bourgeoisie in support of the labor reform approved in 2017. Such action can be understood as a unified response by different fractions of the industrial bourgeoisie to the intensification of strike activity, to the profit compression of non-financial Brazil-based companies and to the increase in labor costs in the manufacturing industry in the first decades of the twenty-first century, during the Workers' Party (*Partido dos Trabalhadores*, or PT) administrations (2003-16). It also argues that this dissatisfaction among the industrial bourgeoisie led to its distancing from the PT administrations, its support for Dilma Rousseff's impeachment in 2016, and the unified action of different fractions of the bourgeoisie in favor of labor reform at the beginning of Michel Temer's administration, which resulted in rising inequalities in Brazil.

Keywords Global Capitalism. Transnational Capitalist Class. Industrial Bourgeoisie. Brazilian Labor Reform. Strikes.

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1 Introduction: The Fractions of the Brazilian Industrial Bourgeoisie as Analytical Units

This article[1] analyzes the action of the Brazilian industrial bourgeoisie, in particular its fraction tied to the transnational capitalist class (TCC), for the approval of the 2017 labor reform and its consequences for the rising inequalities in Brazil since then. The reform, approved at the beginning of Michel Temer's administration, after Dilma Rousseff's impeachment (in 2016), occurred in the context of severe economic crisis and was justified by its proponents as an instrument to reduce unemployment in the country.[2] After years of pressure from employers for the reduction of labor costs, of union power in collective bargaining, and of wages burdens, the Brazilian National Congress approved a broad reform in labor legislation which allowed, for example, the establishment of intermittent and part-time employment contracts, in addition to weakening the union organizations.

Our hypothesis is that there was a convergence between different bourgeois fractions to secure the approval of the labor reform to compress labor costs and recover profitability at a particular context: Dilma Rousseff's impeachment and Michel Temer's rise to the federal government. It seems of particular relevance to focus on such class-based action by the industrial bourgeoisie in this period, since during the Workers' Party (*Partido dos Trabalhadores*, or PT) administrations, in particular that of Dilma Rousseff (2011-16), a proximity of industry employers' associations with the government was indicated, seeking to meet an important part of their demands (Singer 2018). Thus, analyzing the industrial bourgeoisie's support of the labor reform also allows to shed light on the reasons to its estrangement with the PT administrations.

In previous works (Aguiar 2024; Aguiar, Micussi 2022; Micussi 2021) we argued about the pertinence of using the notion of transnationalized fractions of the bourgeoisie to understand the political action of the Brazilian capitalists in the first decades of the twenty-first century. Drawing on the theoretical contributions of the "Global Capitalism School", which draws attention to the formation of the TCC based on the global spreading and functional integration of production (Robinson 2004), as illustrated by the literature on global value chains (Gereffi,

1 Partially based on a previous version published in Portuguese (Micussi, Aguiar 2023). The authors would like to thank The São Paulo Research Foundation (FAPESP, grant #2019/26020-4) and the National Council for Scientific and Technological Development (CNPq) for the grants that made possible the research.

2 Krein, Véras de Oliveira, and Filgueiras (2019) revealed the mismatch between such promises by the labor reform apologists and their subsequent practical effects, like rising unemployment rates.

Humphrey, Sturgeon 2005), it is possible to empirically observe the rise of a fraction of the Brazilian capitalist class which is no longer tied exclusively to national circuits of accumulation, but have also been transnationalized, merging with capitals of other national origins, forming transnational corporations (TNCs).

Based on the analysis of Natura's transnationalization strategy, we argued (Aguiar, Micussi 2022) that such phenomena challenge methodological nationalism, making it necessary, for the very description and understanding of the phenomenon, to use theoretical tools able to accommodate the empirical case of a Brazilian company which became a TNC of superlative dimensions. Moreover, we were instigated by the fact that Pedro Passos, one of the company's largest shareholders, during his two consecutive terms ahead of the IEDI (*Instituto de Estudos para o Desenvolvimento Industrial*, or Institute of Studies for Industrial Development) – the most important Brazilian industry think tank –, had oriented the institute to the defense of trade liberalization policies which tended to favor the large and competitive Brazilian-based TNCs, while harming the national industry as a whole. Since then, the IEDI seemed to seek to represent the transnationalized fraction of the industrial bourgeoisie, often in opposition to other bourgeois fractions. It seemed appropriate to discuss the existence of a Brazilian TCC fraction (or contingent) that seeks to incorporate itself into the transnational accumulation circuits and favors the integration of the Brazilian economy to global capitalism.

By analyzing its defense of labor reform through interventions, press statements, interviews[3] and articulation with political agents, it is clear how, in this episode, the Brazilian industrial bourgeoisie acted as one, in a movement which allied its transnationalized fraction with the industrial bourgeoisie as a whole. This movement is exemplified by the confluence of IEDI and CNI (*Confederação Nacional da Indústria*, or National Confederation of Industry) in a unified political action in support of the approval of the 2017 labor reform in Brazil. The discussion will shed light on its motivations and consequences.

The analysis will focus on the IEDI, representing the transnationalized fraction of the Brazilian industrial bourgeoisie, and on the CNI, the main institution of the national industrial bourgeoisie, which brings together Brazil's 700,000 industrial firms. This allows us to observe how part of the Brazilian contingent of the TCC, organized in the IEDI, acted alongside the industrial bourgeoisie represented by the CNI.

Employer representation in Brazil is structured through sectoral associations, which group all firms in a given industry and elect

3 In this article, all quotes in Portuguese were translated to English by the authors.

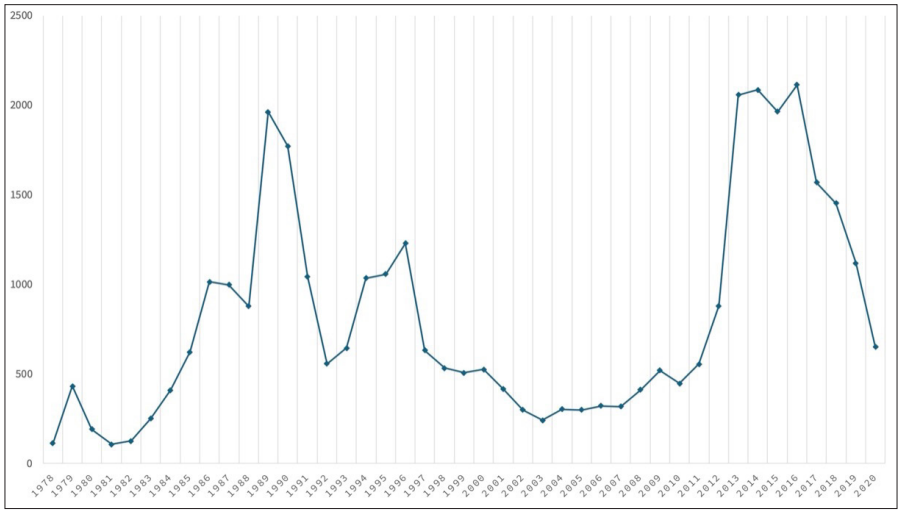
state-level federations, which in turn elect the national leadership of the CNI. This structure tends to privilege small and medium-sized firms – 98.8% of all industrial establishments – because voting occurs at the level of associations and federations. Large firms, though responsible for most production and a substantial share of employment, represent only 1.2% of establishments and thus have comparatively less political weight. This mismatch between economic weight and representational power generates a potentially conflictual scenario in which large national companies are structurally under-represented.

In 1989, large Brazilian manufacturing industries created the IEDI as an unofficial association better suited to represent their interests than the CNI, whose structure favored small and medium firms. Amid the crisis of developmentalism, these companies sought integration into global value chains, an agenda seen as inadequately represented by official employer associations. While earlier the transnationalized fraction of the Brazilian industrial bourgeoisie acted in favor of structural adjustment at the expense of much of national industry, the period analyzed here shows a recomposition of internal cleavages driven by dynamics capable of unifying different bourgeois fractions.

We argue that the unified action of the industrial bourgeoisie to secure approval for labor reform is a response to the Brazilian industrial companies' profit compression within the distributive conflict that has been established in the country from the second decade of the twenty-first century onward. This conflict guides a long-term action by the Brazilian bourgeoisie, which begins with the complaint about labor costs in Brazil at the beginning of the Dilma Rousseff administration, includes the rapprochement of the IEDI's leaders to Michel Temer, then vice-president, and this fraction's support of the 2016 impeachment, culminating in the support of the 2017 labor reform and, as a consequence, rising inequalities in Brazil.

2 The Intensification of the Class Conflict in the 2010s

The distributive conflict presents itself as one of the fundamental dimensions of the Brazilian crisis in the second decade of the twenty-first century. Indeed, the literature has pointed to a dual movement, which combines increased strike activity and the compression of Brazilian private companies' profit rates and profitability. Regarding the strikes, as pointed out by Oliveira (2019), it is possible to identify a boom in the annual frequency of strikes in Brazil starting in 2011 **[graph 1]**.



Graph 1 Strikes in Brazil (1978-2020). Source: DIEESE

Thus, if on the one hand it is possible to identify an increase in strike activity as of 2011, on the other, analyses which make use of different methodologies also point out that, exactly in the same period, Brazilian non-industrial companies began a trajectory of profitability drop. Marquetti, Hoff and Miebach (2016), for example, in a study on the functional distribution of Brazilian income based on data from national accounts, consider that there is a direct correlation between the drop in the corporate profit rate and the increase in the share of wages in national income. Martins and Rugitsky (2018), in turn, also using data from national accounts, move towards a similar conclusion by relating to the crushing of corporate profits during the Dilma Rousseff administration to the increase in workers' bargaining power and the growth of the striking union movement.

The compression of profit rates in the country as of 2011 is observable, for instance, in analyses which take as their object the Brazilian industrial companies' profitability. In a study published in 2016, the IEDI pointed to the drop in profitability of non-financial companies in Brazil as of 2010. According to the institute, two factors contributed decisively to this process: the increase in financial expenses (high interest rates added to the exchange rate devaluation which negatively affects companies with financing in foreign currency) and the increase in production costs (i.e., expenses spent on activities directly related to production such as the use of raw materials and, it should be noted, wages), as shown in Table 1.

Table 1 Profitability Indicators: Industry, Commerce and Services (in %) – 2010 to 2015. Source: IEDI (2016)

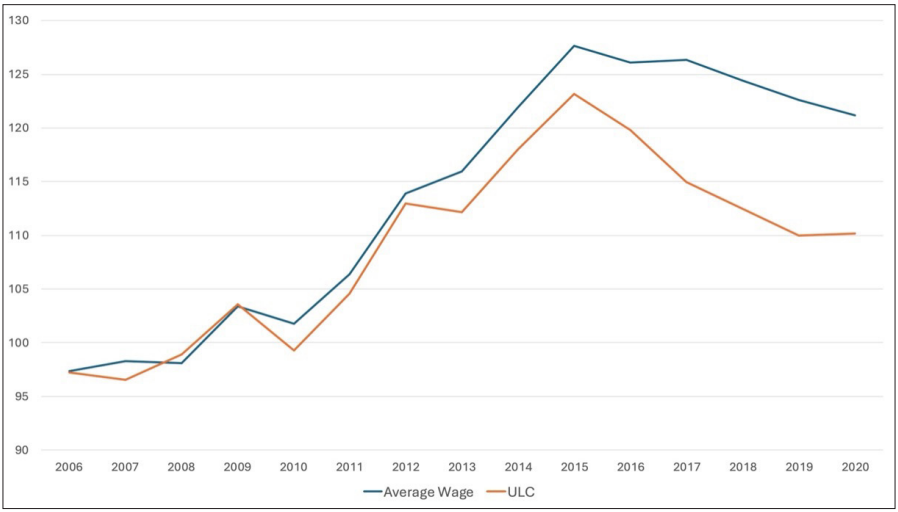
Macro-sectors	Net Profit Margin			Operating margin			Gross profit margin			Profitability Rate on Shareholders' Equity		
	2010	2013	2015	2010	2013	2015	2010	2013	2015	2010	2013	2015
Industry	13,8	2,4	-6,9	19,7	10,9	0,9	32,6	25,5	24,9	14,2	2,8	-10,2
Excluding Petrobras	12,8	0	-5,3	19	10,7	3	31,2	26,5	22,4	16,3	0	-8,4
Excluding Petrobras and Vale	8,3	0	0,5	13,3	6,7	7,6	25,8	22,6	22,8	12,5	0	1
Services	12,9	7,3	1,2	22,8	15,9	11,5	40,7	37,6	29,7	12,7	7,8	1,5
Excluding Energy sector	14,8	11,2	1,8	24,8	21,8	17,3	43	42,9	40	16,6	12	1,7
Commerce	3,3	2,8	0,5	7,4	7	4,4	28,8	30,2	31,2	13,5	12,3	1,7
Total	**12,8**	**3,9**	**-3,7**	**19,7**	**11.9**	**4,5**	**34,8**	**29,4**	**27**	**13,6**	**4,6**	**-5,4**

Marconi (2017), for instance, argues that the increase in the wages rate above the increase in labor productivity in the country depressed the profit rate and the investment in the economy. For this Keynesian-inspired view, the investment contraction reduced aggregate demand, thus lowering the level of economic activity. There would be, therefore, a direct relationship between the profit drop and the crisis in the period.

In effect, if we analyze the Unit Labor Cost (ULC) and the evolution of the average wages in the Brazilian manufacturing industry **[graph 2]**, we see that both were on a ten-year upward trajectory which ended in 2015. If we analyze the data from 2006 to 2020, average wages in the sector, measured per hour worked, remain at high levels in the three-year period from 2015 to 2017, starting to drop as of 2018. There is clearly an upward trend in wages from 2010 to 2017, which is interrupted, starting in 2018, whit a clear downward trend.

The trajectory of continuous increase of average wages in the Brazilian manufacturing industry directly affects, in turn, the ULC, which follows this trajectory. The ULC is calculated from the ratio between average wages (given by the wages sum over hours worked) and productivity (given by the product over hours worked). Thus, if average wages grow more than productivity, the ULC increases. This was the picture until 2015.

Moreover, although it is beyond the scope of this article to analyze the labor reform's impacts on labor value in Brazil, the difference in trajectories is striking: an increase and maintenance of wages levels before the approval of the reform and a decline after its approval.



Graph 2 Evolution of Unitary Labor Cost (ULC) and average wages in the manufacturing industry (annual averages, 2016 = 100). Source: Elaboration of the authors based on data from IBGE and FIERGS

Thus, if it is possible to identify an increase in the strike activity concomitantly with the Brazilian industrial companies' profit rate drop, as well as with the ULC's increase, one of this article's hypotheses is that industrial capitalists related these three phenomena and started to act politically aiming a reduction in labor costs, which contributed to the labor reform's approval in 2017.

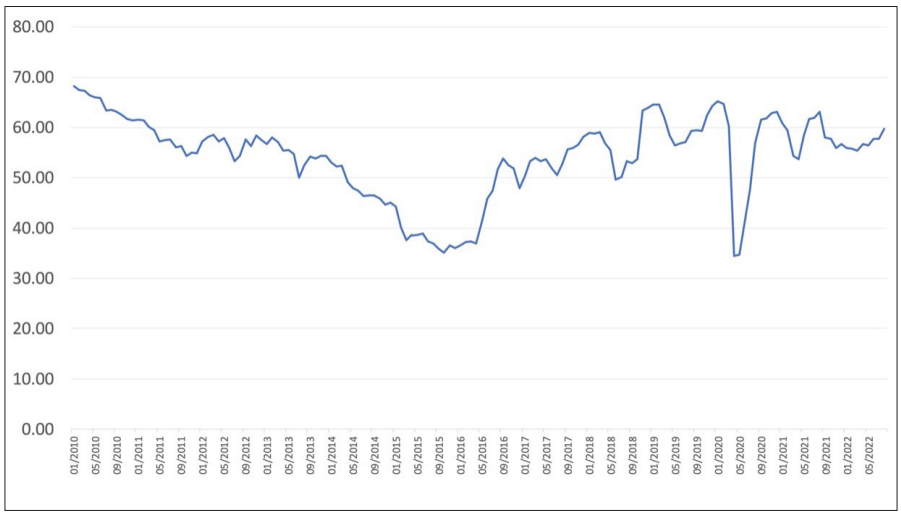
Indeed, taking into consideration the "industrial entrepreneur confidence index" (*índice de confiança do empresário industrial*, or ICEI) – an indicator, created by CNI, of the confidence of national industrialists – one can notice a downward trajectory since 2010. This trajectory only begins to be reversed in late 2015, when the drop stabilizes and, as of April 2016, when confidence is once again re-established.

It is striking how, in the long-term trajectory, the ICEI closely follows the evolution of average wages and unit labor cost in manufacturing, presented above: the ICEI and ULC curves almost mirror each other inversely. If the confidence index shows a downward trend until 2015, and an upward trend starting in 2016, the ULC grows until 2015, when it starts to decline. Although it is hasty to point out a direct relationship between the ICEI and the ULC, it is possible to state that class struggle and distributive conflict are crucial elements in defining what "industrial entrepreneur confidence" really is.

In addition, it is worth noting that, in December 2015, the speaker of the Chamber of Deputies, Eduardo Cunha, opened the impeachment process against Dilma Rousseff. In addition, between April and May

2016, the ICEI indicates a recovery of 9.8 points in "entrepreneur confidence", the same period when, after a vote in Congress, the president was removed from office, giving way to Michel Temer's inauguration. It is precisely in the survey for the month of August (when the Senate finally impeached Rousseff) that the index reached 51.9 points, surpassing the 50-point threshold that, according to the study's methodology, indicates that "industrial entrepreneurs" are confident.

Thus, if there seems to be, in the short-term trajectory, a relationship between the impeachment process and the "industrial entrepreneur confidence", the labor reform's approval – seen by capitalists as one of the main legacies of the Temer administration – it also seems to have directly influenced their confidence. It is possible to identify a new upward trajectory of the ICEI starting in July 2017, when the Congress approved the labor reform **[graph 3]**.



Graph 3 Industrial Entrepreneur Confidence Index (ICEI). Source: CNI

3 Labor Reform: The Bourgeoisie's Response to Class Conflict

The falling profitability of Brazilian industrial companies, concomitant with the increase in strike activity and the rising cost of labor, can be understood as a backdrop for the industrial bourgeoisie's political action for labor reform: discomfort with the value of wages appeared as an important concern in the statements of the Brazilian industrial bourgeoisie and mobilized it in support of the labor reform.

First, let's look at how industrial capitalists have taken stands throughout the class conflict established in Brazil. In a statement to the press in July 2012, the IEDI's chief economist, Julio de Almeida, pointed out the sector's positions ahead of the mismatch between the continuous wage increase in the country and the industrial sector's productivity, which had been stagnant for four years (Rehder 2012). In an interview that year, an important IEDI leader, Ermírio de Moraes, defended the flexibilization of labor laws (Ribeiro 2012). Pedro Passos, on the other hand, in an article with a long praise for the new government policies for the industrial sector, commented on the "pressure factor" exerted by the wages' increase in industry (Passos 2012).

The dispute pro-labor reform begins to dominate the IEDI leaders discourse throughout 2013.[4] In an article for the newspaper *Folha de S. Paulo* entitled "The industry we want", for example, the president of the institute at the time, Pedro Passos, stated that: "First, it will not be possible to overcome the industry crisis without reducing the 'Brazil cost', which requires deepening investments in infrastructure and speeding up tax and labor reforms" (Passos 2014).

The labor reform's defense by the Brazilian industrial bourgeoisie becomes even clearer in an article written jointly by economists from the IEDI and the FIESP (*Federação das Indústrias do Estado de São Paulo*, or Federation of Industries of the State of São Paulo),[5] in September 2014 for the newspaper *Valor Econômico*.[6] In 2015, in a document entitled "To overcome the crisis", the IEDI argued about the necessity, in order to modernize and raise the economy's productivity, of the "simplification of laws and regulations, especially in the tax and labor spheres" and the "preponderance of negotiated over legislated agreements in the labor area" (Iedi 2015, 6). It is noteworthy how the above-mentioned points are among the core elements of the labor reform approved three years later.

Throughout 2016, it is possible to identify a maintained offensive by the Brazilian industrial bourgeoisie in favor of the labor reform's approval. In April of that year, IEDI advisor Marco Stefanini declared to the newspaper *O Globo*: "More flexibility is needed for negotiations between employers and employees. Combining structural reforms, and reactivating private investment, with new concession offers in

4 As can be seen in Lima, Vieira 2014.

5 The most important state federation inside CNI.

6 Comparing the Brazilian industrial sector's competitiveness *vis-à-vis* companies abroad, the authors point out: "The growth of wages above labor productivity would be one of the factors explaining the poor performance of the [industrial] sector… there is a disconnect between labor productivity and wages paid in industry… Along with other factors, this resulted in the manufacturing industry's lethargy, dragging along with it the country's investments and economic activity as a whole" (Francini, Souza 2014).

infrastructure, the consequence will be job creation" (Doca, Sorima Neto, Scrivano 2016).

In June 2017, the then presidents of the CNI, Robson Braga de Andrade, and of the IEDI, Pedro Wongtschowski, signed a joint article in the newspaper *Folha de S. Paulo* defending the labor reform to be approved a month later (Andrade, Wongstschowski 2017). In the same month, the IEDI's former president Pedro Passos also declared to the newspaper *Valor Econômico* his support for the reform. Passos, in an interview that same month, weeks before the reform's approval, stated:

> It's obvious that we have a gigantic distortion. We have four million labor lawsuits filed every year, it's obvious that there's something wrong. The labor legislation in Brazil is obsolete, extremely complicated. I think that the CLT [*Consolidação das Leis do Trabalho*, or Consolidation of Labor Laws, the Brazilian labor code] has a thousand articles, not to mention the TST [*Tribunal Superior do Trabalho*, or Superior Labor Court] precedents. There's no company in Brazil that doesn't have dozens, hundreds, of labor lawsuits… (Guimarães, Vieira 2017)

4 The Industrial Bourgeoisie Mobilizes in Support of the Reform

If the labor reform was the main concern of the industrial bourgeoisie under the Temer administration, it is possible to identify how it effectively worked for its approval. Indeed, analysis reveals that this social class struggled, using its official and unofficial instruments of political articulation, for the reform's approval.

In fact, as of the then President Dilma Rousseff's impeachment crisis, the Brazilian industrial bourgeoisie sought closer ties with her successor Michel Temer. The action of IEDI advisors in favor of Dilma Rousseff's impeachment was clear throughout the crisis and culminated, despite the institute having not taken an official stand on the matter, in a luncheon with Temer, then vice-president, at IEDI's headquarters in São Paulo, on the eve of the process's vote.[7]

Indeed, it is possible to understand the impeachment as a chapter in the long battle waged by the industrial bourgeoisie for the labor reform's approval in Brazil. In this regard, for example, in an interview given after his inauguration, the then IEDI president, Pedro Wongtschowski, when asked about what the government's priorities should be, stated: "A set of projects which indicate how it is going

7 As presented by Fernandes (2016). For a detailed analysis of the IEDI's action during the impeachment, see Micussi 2021.

to solve the fiscal and tax problem, and forward a labor reform" (Carneiro 2016).

If IEDI advisors supported Michel Temer throughout the impeachment crisis and were able to strengthen their relationship, the proximity between the institute's members and the new president was also attested. In this regard, it is worth mentioning a meeting held by the CNI between some of the country's top industrial leaders and president Michel Temer in July 2016, which was attended by some of the IEDI's most prominent leaders.

It is also worth noting how labor reform appears on the agenda of that meeting. Although it was not the meeting's official subject, the reform appeared among the demands presented by the businessmen attending it, as informed *TV Brasil*.[8] In an interview right after the meeting, the CNI's president, Robson Braga de Andrade, referring erroneously to a supposed labor reform which had taken place in France and "increased the working week to eighty hours", he suggested that industrial leaders would be "eager" for "similar changes" in Brazil.

Despite the differences regarding the CNI's and the IEDI's membership base, it is relevant to note that, even though the event was organized by the CNI, important IEDI advisors, such as Pedro Passos and Horácio Lafer Piva, took part of it. Since the labor reform was reported in the press as one of the meeting's main subjects, it is possible to see its importance for both entities, revealing, once again, how the proposal unified the interests of different fractions of the Brazilian industrial bourgeoisie.

Regarding the unification of the Brazilian bourgeoisie's interests around the labor reform, it is worth noting what was reported at the time as a "*Conselhão*", a large council, created by Rosa Weber, Supreme Court minister, in 2017. In its second meeting, held in May of that year, the group, composed of thirteen businessmen, including IEDI advisors Pedro Wongtschowski, Flavio Rocha and Décio da Silva, dealt with the judicialization of labor relations in the country.

The CNI considered labor reform's approval as its "priority for legislative action" in 2017. According to the document "Legislative Agenda for Industry 2017", elaborated by twenty-seven state industry federations and sixty sector associations nationwide, labor legislation was the "minimum agenda" for action that year. In the document's second version, published after the end of that legislative year, the chapter highlighted the approval.

The CNI's concern with labor reform also appears in the document "Agenda for Brazil to emerge from the crisis: 2016 - 2018". Labor relations appear as one of the fundamental demands by the

8 Available at: https://www.youtube.com/watch?v=nYu7v-ljeyM.

Confederation for the "increase in the economy's productivity and competitiveness". This publication offers an interesting analysis because, after its original publication in 2016, the document was updated over the following two years to report on the progress of each of its demands. Thus, in the document published in March 2017, subtitled "Evolution after one year", of the four items in the "Labor Relations" chapter, three appear as "evolving" ("value collective bargaining"; "stop or change the text of Regulatory Norm 12"; and "exclude commuting accidents from Accident Prevention Factor calculation") and one as "completed" ("regulate outsourcing").

In the issue published in November 2018, with the subtitle "Final proposal assessment", three of the four items referring to the confederation's proposals for labor relations were indicated as "completed" and only the item "stop or change the text of Regulatory Norm 12" remained as "partially completed".

The two documents analyzed here give a demonstration of how CNI acted directly for the labor reform's approval in 2017.

It is possible to understand that the highest instance of Brazilian industry's official representation – with its headquarters in Brasília, only a few meters away from the federal government buildings and minutes away from the National Congress – acted as the industrial bourgeoisie's strong political arm for the reform's approval. Thus, despite the differences in membership bases and agendas between IEDI and CNI, a convergence occurred between the two organizations. CNI, with its well-known channels of articulation with the Brazilian Congress, acted by offering political and institutional support for the reform's approval, based on an agenda which unified the whole industrial bourgeoisie.

However, if the labor reform unified the industrial bourgeoisie's action during the Temer government, it is worth noting that, while the IEDI stood side by side with the CNI for its approval, members linked to the institute also acted by opening a battle flank against the Brazilian industry's official representation.

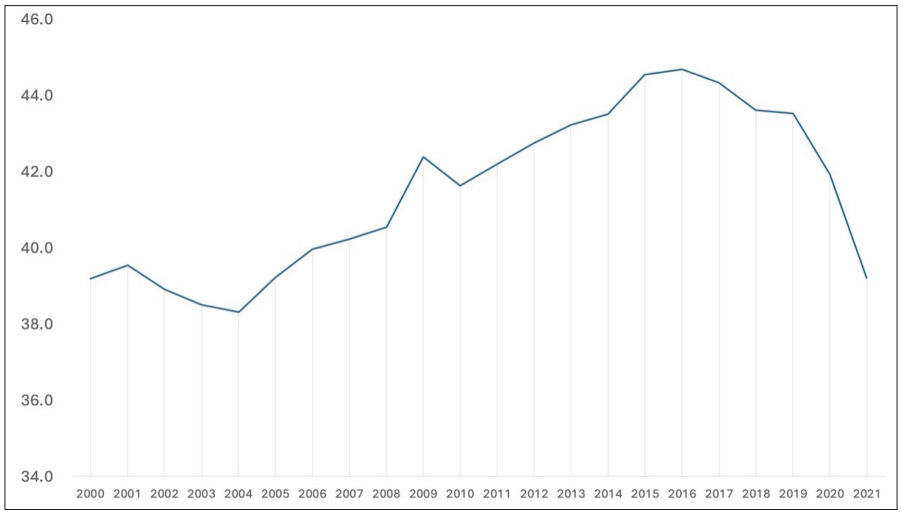
5 The Impact on Inequality

The response of the bourgeoisie to the intensification of class conflict in the 2010s contributed to rising inequality and worsening income distribution in Brazil from the second half of the decade onward.

Indeed, as the literature indicates, after 2015 Brazil entered a period of reversal of the trend of decreasing income inequality that had been occurring in the country since at least 2004 (Rolim 2024). The approval of the labor reform, by effectively reducing the value of labor, contributed to this process.

The wage share is a key measure of income distribution within an economy. As Rolim (2024) notes, this metric, derived from national accounts, captures the fraction of value added that accrues to labor rather than to capital. All else equal, an increase in the wage share implies a rise in real wages, since workers gain access to a larger portion of total income. Conversely, higher wage shares necessarily compress firms' profit margins. As we have argued, it was precisely this dynamic that motivated the industrial bourgeoisie to press for the approval of the labor reform in Brazil. As Rolim states:

> The contrast between the period of increasing wage share (2004-2015) and the period of declining wage share (post-2015) is particularly informative regarding the dynamics of the distributional conflict in Brazil. Between 2004 and 2015, policies of minimum wage increases, higher formalization of employment, and other redistributive policies expanded workers' bargaining power (Baltar 2015). These were important determinants of strong redistributive pressure favoring the working class, such that increases in nominal wages were not fully passed on to prices, exerting a negative effect on profit margins and effectively altering the wage share. Despite these policies having effects on the economy as a whole, the sectoral effects are distinct and particularly relevant to understanding the dynamics of the wage share… [The] increase in the wage share in Brazil between 2004 and 2013 had, among its main determinants, the rise of the wage share in the industrial sector (Rolim 2024, 11)



Graph 4 Wage share in Brazil (%). Source: IBGE

As can be seen in Graph 4, the upward trajectory of the wage share is interrupted in 2016, after which it begins to decline. This outcome was one result of the way distributive conflict was resolved in the country in the mid-2010s. Evidently, other factors also contributed to this process; however, as we argue, the approval of labor reform played a fundamental role in addressing the bourgeoisie's dissatisfaction with rising labor values and workers' bargaining power.

6 From Inter-Class to Intra-Class Dispute

Taking into consideration the reasons of IEDI's creation in the late 1980s, presented before, and considering the alliance established between IEDI leaders and the CNI in support of the labor reform, it is interesting to note how the differences between the official representative associations and the IEDI reappeared, reaffirming the cleavages between them. During the mobilization for the labor reform, the IEDI leaders also advocated for a review of the mandatory contributions of industrial companies to employers' associations, linked to the CNI, and of the mandatory contributions of workers to unions.

Pedro Wongtschowski, Pedro Passos and Horácio Piva, who sat at the table alongside the CNI president and Michel Temer at the event organized by the confederation in mid-2016, wrote:

> Workers pay annually, compulsorily, one day of their salary… representing these entities' main source of income… It is not surprising that there are 11,327 entities qualified to receive the union dues. Among them, there are many front unions, with the sole purpose of collecting the contribution and wasting it on their leaders… On the employers' side, the situation is no more encouraging. The employers' associations' resources come mainly from a contribution, also compulsory, collected at every beginning of the year… It is enough to observe the industry federations' boards to see the distortions caused by the absence, in these entities' management, of real industrialists… These institutions should be obliged to explain to society the use of their resources… This is the discussion we wish to start. There are no easy answers. But there must be a real interest in seeking the justification (or in finding out there is none) for the existence of so many entities, making them work for the benefit of their constituents – workers and entrepreneurs. (Piva, Passos, Wongstschowski 2017)

It is possible to notice, therefore, that the capitalists linked to the IEDI acted, at the time of the labor reform, in a double front: in one, side by side with the other official associations of Brazilian

employers' representation, they supported and defended the labor reform's approval, defending, among other demands, the end of the union dues; in another, they exposed the incoherence of associations such as the FIESP and the CNI, which defended the extinction of the financing source of trade unions analogous to the one through which such employers' associations survive.

7 Final Remarks

This article dealt with the action of two of the main industrial entities in the country, the IEDI and the CNI, for the labor reform's approval. It was argued that both entities represent different fractions of the Brazilian industrial bourgeoisie, which, during the first decades of the twenty-first century, experienced tensions and rifts, but began to engage in a unified class movement after the economic crisis of 2015-16.

The transnationalized fraction of the industrial bourgeoisie, represented by IEDI, began to complain about labor costs in Brazil at the beginning of the Dilma Rousseff administration, approached Michel Temer's platform, who was then vice-president, decided to support the impeachment in 2016 and began to work for the labor reform's approval in 2017. Such a movement, which was carried out with the support of CNI, the highest institution of official industrial representation in the country, can be understood as one of the victorious responses of the industrial bourgeoisie to the falling profit rate of non-financial Brazilian companies from 2010 onwards. As we have shown, this victory contributed to the increase in inequality in the country, insofar as the economy's wage share followed the decline in the value of labor from the second half of the decade onward.

During the struggle for the labor reform's approval, a dispute within the industrial bourgeoisie itself also manifested, revealing a fundamental dimension of the political struggle within the Brazilian industrial bourgeoisie: at the same time that there was a unification for the strengthening of the relative power of capital *vis-à-vis* labor, the cleavages and fractions within it remain evident, as shown by the public differences and the permanent frictions between the IEDI and FIESP/CNI leaders. These tensions end up revealing, in the political field, the structural heterogeneity of Brazilian industry, revealing not only differences in sectors and size, but also in productivity, competitiveness and interaction with the national and global economy.

The article dealt with a specific case of unification of the Brazilian industrial bourgeoisie's different fractions around a common goal. As we have argued, the unitary action of the Brazilian industrial bourgeoisie developed in a specific political and economic context, marked by the intensification of strike activity, by the increase in labor costs and by the compression of profits of industrial companies

in the country. The discussion, therefore, allows us to conclude that the Brazilian industrial bourgeoisie acted in a unified way in Dilma Rousseff's impeachment process until at least the labor reform's approval, during the Michel Temer administration.

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Race, Work, and Social Inequality
Reconfiguring Precarity in the Brazilian Labor Market

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Abstract This article examines the racialized structure of the Brazilian labor market and its role in reproducing durable social inequalities. Drawing on recent data from the Inter-Union Department of Statistics and Socioeconomic Studies (DIEESE), it shows how racial hierarchies remain embedded in occupational segregation, income disparities, and unequal access to opportunities. The analysis focuses on call centers and app-based delivery services – highly precarious sectors disproportionately staffed by racialized workers – highlighting four mechanisms of durable inequality: exploitation, opportunity hoarding, emulation, and adaptation. Mobilizing the concept of the precariat, the article characterizes workers facing chronic insecurity, unstable employment, low wages, weak social protection, and indebtedness. Despite periods of economic stability, racial inequalities in income and mobility persist. The cases also reveal emerging forms of collective action and identity formation at the intersection of class, race, and gender, underscoring the need for sustained, multidimensional policies to confront structural racism and socioeconomic exclusion.

Keywords Brazil. Race. Work. Labor Market. Social Inequality.

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1 Introduction

Over the past three decades, the Brazilian labor market has undergone profound transformations that reflect changes in the economy, in productive organization, and in labor relations. One of the most significant shifts has been the declining relative weight of the manufacturing sector – historically responsible for absorbing a large share of the urban labor force – and the consequent expansion of the service sector, particularly in commerce, logistics, telecommunications, education, health, and information technology. This transition has altered not only the occupational composition of the workforce but also the nature of labor relations, privileging subordinate and lower-skilled functions, which are frequently precarious and marked by limited formal protection (Antunes 2020).

At the same time, the process of productive restructuring and labor flexibilization – materialized mainly through business outsourcing strategies and the hiring of workers via labor intermediation firms – has redefined the centrality of unions, weakening traditional instruments of collective bargaining. This dynamic has contributed to the fragmentation of workers' collective identities, further dispersing and individualizing their class experiences (Braga 2016; Antunes 2009). Meanwhile, new forms of employment, such as platform labor, temporary and intermittent contracts, and informal jobs, have expanded the heterogeneity of occupational trajectories, reinforcing the reproduction of historical inequalities related to gender, race, and social class (Guimarães, Hirata 2024).

Such transformations have also reshaped workers' strategies of mobilization and resistance. While the consolidation of a fragmented yet oversized service sector and the flexibilization of labor have reduced the incidence of the massive strikes once typical of the industrial sector, new – often informal – spaces of organization have emerged, articulating forms of community-based solidarity and new collective identities (Braga 2017). Thus, the contemporary Brazilian labor market is marked by a growing tension between the precarization of workers' reproductive conditions, the fragmentation of labor relations, the weakening of unions, and the emergence of embryonic forms of collective resistance that operate largely outside traditional labor organizing strategies.

Furthermore, among the most significant transformations in the Brazilian labor market in recent decades is the contrast between two interlinked processes: on the one hand, the massive incorporation of racialized workers – particularly young Black women – during the 2000s; on the other, the intensification of informalization and precarization following the unemployment crisis of the mid-2010s (Guimarães, Hirata 2024). In the early twenty-first century, economic growth and the adoption of social and educational inclusion policies,

such as Bolsa Família and ProUni, expanded access for Black Brazilians both to higher education and to the formal labor market. This period was marked by a relative reduction in income concentration among those who depend on earnings from labor, allowing many previously excluded workers to enter formal employment (Braga 2012).

However, the economic crisis of 2015-16 interrupted this brief cycle of inclusive expansion, reversing many of the gains achieved in the previous decade. The recession – combined with the adoption of austerity policies and the 2017 labor reforms – led to a rapid expansion of informality (Antunes 2020). According to data from the Continuous National Household Sample Survey (PNADC), produced by the Brazilian Institute of Geography and Statistics (IBGE), the informality rate in Brazil rose from 38.7% in 2016 to 44.3% in 2019, highlighting the deterioration of labor conditions. This process disproportionately affected racialized workers. In this sense, the recent cycle of the Brazilian labor market reaffirmed the centrality of racial and gender hierarchies in the reproduction of social inequalities and in defining the boundaries between protected and precarious work (Guimarães, Hirata 2024).

Moreover, in November 2017, the dismantling of Brazil's protective labor framework entered a new phase. The labor reform (Law 13.467) was enacted under the claim that flexibilizing labor relations would promote formal job creation. However, two years after its implementation, the unemployment rate remained virtually unchanged, indicating that the promised effects failed to materialize (Braga 2016). Beyond this, the reform introduced new employment modalities – such as intermittent work – that heightened the precariousness of labor relations, particularly for racialized workers who already faced substandard conditions of social reproduction (Antunes 2020). As a result, the expectations held by racialized workers regarding a potential strengthening of labor protections through formal employment dissipated amid a labor market increasingly characterized by informality, expanding precarious work arrangements, and persistent structural inequalities of gender and race (Guimarães, Hirata 2024).

The objective of this article is to analyze how these processes unfold through the experiences of workers in two segments of the service sector, namely call centers and app-based delivery services. We understand that these two cases exemplify, in a paradigmatic manner, the patterns of exploitation, subordination, and precarization that have historically shaped the incorporation of racialized workers into the Brazilian labor market. At the same time, they also illustrate possibilities for resistance, as demonstrated in the forms of organization and mobilization developed by these segments of the working class.

2 Clóvis Moura and the Formation of the Brazilian Labor Market

Over the long period described above, it has become increasingly evident that mechanisms of exploitation and segregation adapt to the transformations of Brazilian capitalism, continually updating and reproducing racially rooted forms of oppression within the labor market (Moura 1988; 1994). Transformations in the Brazilian economy – especially those stemming from financialization, deindustrialization, and the widespread adoption of outsourcing – have intensified the vulnerability of the Black population, which remains disproportionately concentrated in informal, low-wage, and poorly protected occupations. This persistence reveals the historical continuity of a racialized pattern of labor insertion in which skin color remains a fundamental marker of inequality and exclusion (Moura 2019).

This contemporary reading of racial and class inequalities resonates with broader interpretations of Brazilian social formation that identify the legacy of slavery as a determining axis in the organization of work. Among the most influential interpreters of this historical trajectory is the sociologist Clóvis Moura. One of the foremost representatives of Black Marxism in Brazil, Moura became known for analyzing the intersection of race, class, and labor, contributing to an understanding of Brazilian capitalism as a structure intrinsically linked to the exploitation of the Black population – initially enslaved and later rendered surplus within the labor market (Moura 1988). He also emphasized the centrality of Black political agency – from the quilombos to contemporary forms of cultural resistance – interpreting these expressions as political confrontations against the plantation regime and its historical afterlives (Moura 1994; 2019).

According to Moura (1988), the formation of Brazil's racialized labor market has deep roots in the history of colonial slavery and the plantation regime developed between the sixteenth and nineteenth centuries. Brazil received approximately 46 percent of all Africans transported to the Americas, totaling nearly five million enslaved workers. Through their coerced labor, they sustained the production of sugar, minerals, coffee, and other export commodities, enabling the reproduction of expanded capital accumulation in the colonial context and establishing a structural pattern of exploitation grounded in political violence and racial oppression.

For Moura, the colonial state developed systematic mechanisms of repression to control the enslaved population and prevent revolts, creating what amounted to a permanent state of civil war. Legal ordinances, patrols, militias, public executions, and corporal punishment reinforced the disciplining of Black labor

while ensuring the maximization of plantation profits. Thus, class struggle – shaped by enslaved people's resistance – must be the starting point for understanding Brazilian society, standing in contrast to interpretations that naturalize Black subordination or celebrate a supposed racial harmony.

Black resistance manifested itself both individually – through escapes, suicides, and acts of sabotage – and collectively, through rebellions, strikes by freedpeople, and the formation of quilombos, with Palmares representing the most emblematic expression of organized resistance. Moura interpreted the quilombo experience not as a mere African survival but as a process of "becoming Black", through which the enslaved adapted customs, languages, and cultural practices to the new colonial reality, creating alternative social and political structures more efficient than the plantation regime itself. These spaces constituted models of autonomy, self-sustaining economies, and collective political power that directly challenged the colonial order.

The transition from slave to free labor in the nineteenth century did not dissolve these racial relations; rather, the plantation elite articulated a project of "whitening" Brazilian society. Laws such as the Land Law (1850) and the Eusébio de Queirós Law (1850) restricted access to property, simultaneously ending the transatlantic slave trade and promoting European immigration. Black freedpeople were pushed into precarious and informal occupations – day laborers, street vendors, domestic workers, peddlers, and rural workers without contracts – forming a surplus population. This mass of racialized workers became a central instrument for depressing wages and disciplining the free labor market, while European immigrants were incorporated under far more favorable conditions.

Moura argues that the ideology of "racial democracy", promoted by intellectuals such as Gilberto Freyre, served to mask these mechanisms of oppression. By presenting racial mixture as synonymous with equality, elites obscured the persistence of racial hierarchy and naturalized the marginalization of the Black population. Unlike in countries where segregation was explicitly institutionalized, Brazilian racism consolidated itself in an "opaque", invisible, yet highly effective form, sustaining economic exploitation and reproducing inequality.

In this context, Black resistance assumed innovative and politically significant forms. Cultural, recreational, sports, and religious associations – including terreiros of Candomblé – created practices that affirmed Afro-Brazilian identity and resisted marginalization. Moura emphasized that these organizations did not simply preserve African traditions; they adapted them to local conditions of oppression, producing a critical culture of resistance that combined symbolic, social, and political elements. By symbolically subverting racial

hierarchies and valuing Black ancestry, these groups operated as instruments of collective empowerment and as expressions of Black political agency, mediating the relationship between race and class.

3 2000s: The Racialized "Precariat" in the Call Center Sector

In sum, Clóvis Moura's analysis reveals that the racialized labor market in Brazil is the result of a long historical trajectory marked by slavery, political violence, and the construction of mechanisms of social and racial exclusion. The transition to free labor, far from signifying economic democratization, reorganized the labor market so as to maintain the Black population in subordinate positions while incorporating European workers into the most privileged occupations. Thus, racial oppression and class inequality mutually reinforce one another, sustaining a system of exploitation that conceals itself beneath the myth of racial equality and mestiçagem.

This legacy is continuously updated through the metamorphoses of labor in the country. That is, the reproduction of class and racial inequalities shapes not only the structure of the Brazilian labor market but also the collective experiences and expectations of the working class. Even during periods of economic expansion or social-inclusion policies, such as in the early decades of the twenty-first century, the barriers imposed by racialization persist, limiting possibilities for upward mobility and reconfiguring occupational hierarchies.

In the 2000s, for instance, the call center sector emerged as one of the main entry points into formal employment in Brazil, absorbing a mass of young women – mostly Black or brown – from the urban peripheries of major metropolitan regions. In cities like São Paulo, Salvador, Recife, and Belo Horizonte, call centers consolidated themselves as major employers of the working-class youth (Braga 2012). These women, often the daughters or granddaughters of domestic workers, carry the historical marks of racial and social exclusion that have shaped the formation of the Brazilian working class, expressing in the present the continuity of the structures of subordination that Moura had identified in his analysis of Brazilian racial capitalism.

The growth of this type of employment cannot be understood outside the neoliberal restructuring that redefined the labor market in the final decades of the twentieth century. The formalization of precarious employment identified by Braga (2012) expressed the central contradiction of recent Brazilian capitalism: the expansion of jobs with formal contracts coexisting with the deepening of exploitation and insecurity, especially for racialized workers. The trajectory of these workers therefore embodies the historical continuity between

subordinate labor, domestic work, and contemporary forms of precarious employment, in which formalization does not signify emancipation but rather the reconfiguration of subordination under new languages and technologies of control (Antunes 2018).

Although employment in call centers was formally regulated – ensuring basic labor rights such as an employment contract, paid leave, and year-end bonuses – it rested on a regime of intensive exploitation, despotic control, and systematic surveillance. The physical layout of call centers, filled with uniform cubicles, reflected the industrial logic of productivity and repetition, while digital monitoring systems reinforced control over each gesture and word of the operators. Thus, contractual formalization did not eliminate precarity; it merely displaced it into a domain where the time, voice, and emotional labor of racialized women became directly commodified.

This form of labor management exemplifies what Antunes (2009, 2013, 2020) has called the "new service proletariat", marked by intensified exploitation under the guise of modernization. In this sense, the call center emerged as an "immaterial assembly line", combining Taylorist logic with the affective capture demanded by informational capitalism (Antunes, Braga 2010). At the same time, it updated the colonial and patriarchal legacy that has long treated Black women's bodies as instruments of labor, subordinated and controlled through racialized dispositifs of power (Gonzalez 1988; Braga 2012).

Throughout the 1990s and 2000s, the creation and expansion of the call center industry were closely tied to the process of privatization and neoliberal restructuring of the Brazilian economy in the 1990s. The dismantling of state-owned enterprises and the diffusion of outsourcing opened space for a new type of intermediary service, focused on customer management and digital mediation. During the Lula administrations, this industry became a symbol of the "new formal job", which increased the number of work contracts but left intact the core of the super-exploitation of racialized labor.

Indeed, Black women predominantly occupied the sector's lower-tier positions – those involving direct interaction with customers, under the most intense conditions of monitoring and pressure – while supervisory and managerial roles, with higher wages and less exposure, were largely filled by white men. This divide reproduced the historically blocked patterns of racial mobility that have structured the Brazilian labor market since the post-abolition period.

Daily work in call centers combined formal employment, a subjective experience of precarity, and despotic surveillance. Operators had their time meticulously counted, their breaks monitored, and even their tone of voice controlled. Software recorded every second between calls, and any deviation from the expected pattern could result in a warning or dismissal. This control is, in

essence, racialized, imposed upon bodies historically constructed as docile, resilient, and servile. The "Black female voice" becomes both a commodity and a target of discipline. It is expected to display empathy and patience – traits racially coded – while being denied decent wages and opportunities for advancement.

This is a contemporary form of emotional and corporeal exploitation that requires workers to transform their affectivity into productivity. As Braga (2012) noted, despite the precarity and the physical and mental strain, call center employment was perceived by many of these women as a form of upward mobility compared to domestic work. The uniform, the ID badge, and the air-conditioned office symbolized an entry into the world of the "real job", even if wages remained low and control suffocating.

This perception of mobility – more symbolic than material – reveals the ambivalence of Brazilian racial capitalism: a sense of achievement within a structure of subordination that remains largely unchanged. Within the broader context of Lulist hegemony, such ambivalence was politically mobilized, transforming formalization and access to credit into signs of inclusion, even at the cost of intensified super-exploitation.

In the 2010s, this apparent stability began to be questioned. Increasing union mobilization among call-center operators, especially in the capitals of the Southeast and Northeast, brought visibility to the contradictions of the model. Brazilian unionism faced, in that period, the challenge of incorporating precarious and racialized workers who expressed new sensibilities and repertoires of collective action (Braga 2017). Strikes and stoppages began to denounce not only the exhausting pace and low wages but also everyday humiliations, moral harassment, and the lack of career prospects.

This was precisely the reality we observed when analyzing the relationship between call-center workers and the labor movement in the second half of the 2000s. Despite their limited political experience, these workers sought support from unions to advance their labor demands. And how could it be otherwise in a sector marked by low wages, high turnover, widespread illness, and moral harassment?

The deepening of workers' experience with the despotic labor regime of the call center industry fostered not only increasingly critical attitudes toward companies but also embryonic forms of class consciousness, which were developed by unions. In São Paulo, unions undertook a remarkable effort to approach the sector's workforce. By mapping workers' characteristics – gender, race, age, and sexual orientation – they reconfigured their agenda, diversifying it and innovating on several fronts. The main unions in the telemarketing sector decided to participate in the organization of São Paulo's LGBT Pride Parade, mobilizing one of the event's most traditional blocs (Braga et al. 2011).

In addition to participating for many years in the Pride Parade through their organizing and unionization campaigns, Sintratel developed initiatives with the Secretariat for Human Rights of the Presidency of the Republic and the Public Prosecutor's Office to curb sexual harassment in companies and combat racial discrimination. The union also took part in the World Social Forum, where it began organizing international solidarity campaigns in countries where Atento – the largest call-center company in the world – operates.

The success of these efforts can be measured by the growing number of strikes and stoppages among call-center operators in São Paulo. Practically nonexistent at the sector's inception, strike movements developed to the point of standing out within national bank-worker strikes. Between 2008 and 2012, four national bank-worker strikes took place with effective participation from call-center operators. In 2012 alone, the bank-worker strike reached a peak of 280,000 workers and lasted ten days (DIEESE 2013).

Black women became protagonists of new, often subtle – but politically significant – forms of resistance in the call-center sector: using social networks to expose abuses, forming collectives, and taking the lead in stoppages and strikes (Braga 2017). These practices point to a process of political subjectivation rooted in daily life, marked by the combination of economic exploitation and political expropriation.

Thus, in the 2000s, the call-center sector revealed the contemporary face of Brazilian racial capitalism: an economy that combined technological modernization, employment formalization, and the reproduction of racial oppression. Beneath the surface of glass towers and scripted dialogues pulsed the historical continuity of a social structure founded on the exploitation of Black and female labor.

4 2010s: Reconfiguring Precarity in the App-Based Delivery Sector

During the coronavirus pandemic, Braga and Silva (2022) conducted field research aimed at understanding the extent to which the combination of the employment crisis, labor reform, and the public-health emergency had reconfigured the pattern of labor-market insertion among young Black, poor, and peripheral workers. The investigation sought to examine how these processes interacted to deepen precarization and redefine the boundaries between employment, unemployment, and underemployment in Brazil's major urban centers.

The ethnographic research, carried out between 2019 and 2020 in the area surrounding Avenida Paulista in São Paulo – one of the main financial and symbolic hubs of Brazilian capitalism – demonstrated

that app-mediated work had become one of the primary points of entry into the urban labor market. Young workers, many of whom had been expelled from formal jobs during the crisis or prevented from accessing them, found in digital platforms an alternative means of subsistence. However, this insertion occurred under conditions marked by profound insecurity, long working hours, absence of social protection, and a model of algorithmic management that fully transfers the risks of the activity onto the worker (Abílio, Amorim, Grohmann 2021).

More than a mere occupational reconfiguration, the expansion of platform-based work expresses the radicalization of long-standing trends of labor informalization in Brazil, now draped in a rhetoric of autonomy and entrepreneurship under a hyper-technological digital umbrella. In this context, Black and peripheral youth – historically concentrated in the most vulnerable segments of the productive structure – have become, unsurprisingly, the main contingent of this new digital precarity, reproducing in updated forms the racial and class inequalities that structure Brazilian capitalism. Different profiles of the category across Brazil confirm that most workers in this segment are Black or brown (pardos).

Many of Braga and Silva's (2022) findings can be reasonably generalized to other parts of the country. From a territorial perspective, in numerous areas of Brazilian cities it is possible to observe the concentration of young workers – mostly Black or brown and originating from urban peripheries – whose insertion into platforms reflects the historical continuity of the racialization of labor relations in the country.

These workers cluster in strategic locations – sidewalks in front of shopping malls, public squares, areas near bars and restaurants – that function as hybrid spaces of work, rest, and sociability. In these "informal stations" or "pockets", micro-communities of support and cooperation emerge, where the sharing of information, meals, and devices (such as outlets and chargers) substitutes for absent institutional mediations. This precarious network of solidarity constitutes an "unprotected labor community", typical of the platform era, in which work is organized outside traditional legal frameworks but within dense circuits of economic and technological dependence (De Stefano 2016).

The ethnography also reveals a curious cultural dimension: young couriers – wearing popular peripheral brands, listening to funk or rap – display the signs of a racialized peripheral identity forged along symbolic boundaries between center and periphery. Their presence in central avenues, equipped with motorcycles, bicycles, and brightly colored delivery backpacks, exposes an urban paradox: they render visible the labor force that sustains the city's consumption while remaining invisible in terms of rights and social recognition.

Individual trajectories – such as those of Kleber and Francisco (fictitious names) – illustrate the continuities and ruptures of this process. Kleber, a young Black man from São Paulo's East Zone, had been dismissed from a subcontracted metalworking job after returning from medical leave. Upon entering the delivery sector, he found greater flexibility and a sense of autonomy in contrast to the rigidity of factory discipline. Yet this "freedom" is embedded in what Sennett (1998) termed the corrosion of character: flexibility erodes collective bonds and internalizes control, transforming autonomy into self-management of one's own economic exploitation.

Francisco, a former Black telemarketing operator, compared the mental strain of cognitive work to the physical effort of deliveries. His valorization of the "freedom" from supervisors revealed the shift from a disciplinary logic to one of algorithmic self-control (Abílio, Amorim, Grohmann 2021). Here, the rhetoric of autonomy is internalized as a subjective value, functioning as an ideological mechanism that naturalizes precarity – a phenomenon Nancy Fraser (2022) situates within the current "crisis of social reproduction".

Cases such as those of Higor (16) and Marcelo (17), who used accounts registered to third parties because they were underage, illustrate extreme informality and the absence of effective regulation in digital labor. Their early insertion into platform work reflects the process of "uberization", in which learning to work occurs directly within the experience of labor insecurity. This trend reinforces Braga's (2017) diagnosis of a global "precariat" characterized by chronic insecurity, weakened unions, and fragmented identities.[1]

The case of Lucas (22), a young Black former formal waiter, deepens this diagnosis. After the restaurant where he worked closed, he came to depend exclusively on deliveries, perceiving in them "better prospects" than in formal employment. His trajectory demonstrates the shift from a Fordist ideal of stability to a neoliberal ideal of self-entrepreneurship, even under conditions of profound vulnerability. Lucas embodies, in the realm of labor, what Mbembe (2020) termed necropolitics: the constant exposure of Black life to risk – of streets, traffic, and violence – in the name of an almost always illusory promise of economic freedom.

Taken together, these experiences indicate that app-based delivery work in contemporary Brazil constitutes a reconfiguration of

1 We understand the precariat as the segment of the working class subjected to unstable labor relations, low wages, and limited social protection, whose structural condition of insecurity, resulting from successive reconfigurations of the commodification of labor, is not transitory but permanent. It consists of a group of workers in constant movement between the intensification of economic exploitation and the expansion of political expropriation, a dynamic expressed in high turnover rates, informality, and increasing indebtedness to the financial system (Braga 2012; 2017).

long-standing racial hierarchies, now updated and operationalized by digital platforms. Presenting themselves as "autonomous", workers absorb the costs of reproducing their labor power (equipment, time, risks), while companies exempt themselves from labor responsibilities by denying any employment relationship. This constitutes a regime of accumulation based on the total externalization of risk and the naturalization of racial inequality as an organizing principle of precarity.

Sociologically, the figure of the app-based courier synthesizes three structural dimensions of contemporary capitalism: the racialization of labor, which positions Black youth in the most vulnerable and physically exposed jobs; political and union expropriation, intensified by deindustrialization and fragmented labor ties; and the individualization of risk and responsibility, a hallmark of neoliberalism.

The combination of these factors produces a precarious urban working youth occupying the streets and avenues of major cities – highly visible yet profoundly insecure and legally unprotected. The app, the smartphone, the motorcycle, and the bicycle replace the punch-clock and the factory uniform, but the underlying logic remains the same: racialized exploitation as a historical axis of capitalist accumulation in Brazil.

Thus, app-based delivery work not only expresses a new form of exploitation but condenses a long history of inequality. It translates, into algorithmic language, the persistence of a racial division of labor that spans centuries of social formation. Ultimately, these young Black workers from the urban peripheries constitute the visible link between the slaveholding past and the digital present: an essential yet disposable labor force, self-managed and monitored by algorithms, sustaining the city while remaining excluded from the sphere of salaried citizenship.

Unsurprisingly, in many of the category's recent protests across Brazil, workers frequently invoke the notion of "modern slavery", a term also mobilized in the national campaign against the 6-day workweek. Despite the discourse of autonomy and economic freedom gaining significant hegemony, its limitations became evident when confronted with the harsh concrete reality faced daily on the streets, under sun and rain. It did not take long for them to mobilize. The #BrequedosApps became a major turning point – a culmination of revolt against degrading living and working conditions (Santana, Braga 2020).

When the coronavirus pandemic struck, the situation for the Brazilian working class was already dire, particularly after the 2017 labor reform. Those who still held minimally protected formal jobs were either dismissed or forced into contract suspensions, reduced working hours, and wage cuts. The unprotected – i.e., the

most vulnerable segment of the working class, including racialized workers – faced the tragic choice between the virus and hunger.

By joining the vast ranks of informal workers who make the streets their workplace, many couriers subverted their social invisibility – both through their physical presence in nearly deserted cities and through the essential role they assumed during social isolation. Delivery workers had already been transforming the urban landscapes of large Brazilian cities due to their sheer numbers – whether riding motorcycles or bicycles, carrying brightly colored backpacks emblazoned with platform logos. Exposing themselves to risk, they ensured that large segments of the middle class could remain in isolation.

It was within this context that delivery workers' demands emerged in their struggle against the precarization of work and life. Already exposed daily under conditions of social unprotection – "on their own" and "with no rights", as they themselves articulate – and during the pandemic forced into the tragic dilemma of dying from the virus or dying from hunger, these workers were pushed into high-risk exposure without even the minimal emergency aid from the government. In addition to lacking social rights, they face long working hours, extreme pressure for speed, high accident rates, and poor remuneration.

Despite mobilizing a workforce larger than many economic sectors, platform companies – while making enormous profits – do not consider themselves employers, referring to workers euphemistically as "partners", supposedly intermediating between restaurants, couriers, and consumers. They thus attempt to distance themselves from any employment relationship. Workers operate at their own risk, even supplying their own equipment such as motorcycles and bicycles. Many couriers fall into debt to purchase a motorcycle in order to work.

The already dramatic scenario became even more severe with the arrival of the pandemic, fueling a climate of discontent that culminated in two instances of nationwide strikes in July 2020. These actions constituted the first national mobilization of the category, whose demands, as many participants stated, "ask for the bare minimum". The movement's public platform included: higher minimum delivery fees, higher rates per kilometer, life and theft insurance, accident insurance, provision of PPE (such as masks and sanitizer), paid leave in cases of COVID-19 infection, and an end to unjustified account blocks.

Judging by their demands and testimonies, it was clear that the movement sought redistribution, recognition, and dignity at work. It aimed to secure minimum conditions for a dignified livelihood for workers who, as some emphasized, were "going hungry while delivering food".

The impact on delivery volume suggested consumer support, reflected in a reduction in orders on the strike days and low app ratings. Despite attempts by companies to minimize the mobilization, its effects were felt. Moreover, many workers who did not participate directly expressed support for the demands.

The mobilization encouraged reflection on the creation of collective identities among subaltern classes and strengthened autonomous initiatives, even if it did not, at that point, generate an alternative model of organization beyond traditional forms. Nevertheless, significant steps were taken with the establishment, in 2022, of the National Alliance of App-Based Delivery Workers (ANEA) by movement leaders from across the country.

The movement had major public resonance, revealing the labor conditions of workers who are visually ubiquitous yet socially invisible across urban landscapes – standing at the entrances of buildings and homes, bearing brightly colored backpacks, until then anonymous. This visibility was achieved largely thanks to the category's intense digital activism on social media (Santana 2023).

5 Conclusion

Recent publications by the Inter-Union Department of Statistics and Socioeconomic Studies (DIEESE), based on IBGE's PNADC, reinforce the broader picture outlined throughout this text. In The Inclusion of the Black Population in the Labor Market (2023), we find that the Black or Brown population constitutes 56.7% of the Brazilian population. Black women and Black men form the majority among the employed, the informal workers, and the unemployed. A total of 45.2% of the Black population works in informal employment. Among Black women, 45.6% work without a formal contract and without contributing to social security. Black women earn 38.9% less than non-Black women, 53.7% less than non-Black men, and 20% less than Black men. Among men, Black men earn 41.9% less than non-Black men and 23.3% less than non-Black women. This disparity extends to managerial and leadership positions, of which only 33% are held by Black women and men. Thus, as indicated earlier, while they are an overwhelming minority in higher corporate hierarchies, Black Brazilians constitute the majority of the unemployed and are concentrated at the bottom of the wage pyramid.

In the 2024 report, DIEESE highlights that although recent years have seen relative political stability – allowing economic activity to expand, unemployment to fall, formal employment to grow, and wages and total earnings to rise – these "improved labor market conditions, however, were not sufficient to reduce racial income inequality in Brazil". Thus, even in favorable economic environments with positive

labor-market indicators, the impact on racialized workers is limited, failing to produce any substantial shift in the structural pattern of inequality, either within or beyond the sphere of work.

One conceptual lens through which to examine the two cases discussed here is what Tilly (1998) defines as durable inequality. For Tilly, inequalities consist in the unequal distribution of attributes across social units – individuals, categories, groups, or regions. Such inequalities do not necessarily persist over time; they may appear in one context and disappear in another, without becoming structurally embedded. Durable inequalities, by contrast, are those that do not vanish through individual effort, merit, or upward mobility. They persist, becoming part of a society's basic structures and enduring across generations. This framework shifts the analytical focus away from individual characteristics to the structural determinations that shape individuals.

For Tilly (1998), durable inequality is neither the natural result of individual differences nor simply a function of merit or effort. Instead, it is socially produced and maintained by organizational mechanisms that repeat over time. This type of inequality emerges relationally, through social categorizations – such as race, gender, class, and religion – that become markers of access to resources, opportunities, rights, and prestige.

From this perspective, durable inequalities persist because they are institutionally organized and embedded in the interactional processes that structure social life. They are maintained through four central mechanisms that reproduce unequal distributions of power and access across generations. The first is exploitation, in which one group extracts resources or benefits from the labor of another, sustaining an unequal relationship. The second is opportunity hoarding, which occurs when organizations distribute opportunities in ways that favor certain groups while restricting access for others. The third mechanism is emulation, through which institutional models that produce inequality are copied and reapplied in new contexts, thereby widening their reach. Finally, adaptation refers to the creation of routines, norms, and cultural practices that naturalize and reinforce these inequalities, making them appear as normal features of social life. Together, these four mechanisms reproduce and maintain inequalities across generations.

When we examine the two empirical cases considered here, these mechanisms become clearly visible in both their structural and dynamic dimensions. In both the call center sector and the app-based delivery sector, the workforce is predominantly composed of racialized workers who are subjected to precarious and despotic labor conditions. Both sectors exhibit a high degree of exploitation of vulnerable segments of the working class, a severe restriction in the horizon of opportunities available to them, the persistent reproduction

of historical structures, and the deep naturalization of routines rooted in durable inequalities. Thus, neither call centers nor delivery platforms escape the racialized logic of the Brazilian labor market. On the contrary, both sectors reinforce and update that logic through new technological frameworks and digitalized management systems.

The sectors also share similarities in the process of consciousness-building and identity formation among workers, particularly in how class, race, and gender intersect. Workers often begin by accepting the conditions to which they are subjected, but gradually develop critical perceptions that give rise to collective indignation – much like in other contexts marked by heavy use of social media and digital platforms (Santana 2025). In this environment, to varying degrees, workers receive organizational support from traditional structures such as unions, as well as from autonomous collectives and social movements. In both cases, these workers have demonstrated their capacity for mobilization, with considerable impact, even if still limited in terms of generating structural change in their conditions.

As becomes evident, confronting this broader landscape of durable inequality requires action across multiple fronts and dimensions. As DIEESE (2024) emphasizes, if "the inclusion of a substantial portion of the Black population continues to occur under inadequate conditions even in favorable political and economic moments, the importance of active measures to reduce racial inequalities becomes unmistakable". Furthermore, any effort to reduce income inequality in Brazil must necessarily involve confronting racial discrimination. Similarly, "policies targeting the Black population will only be effective if implemented alongside measures that address broader socioeconomic inequalities".

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The Production and Reproduction of Educational Inequalities in the Formation of Brazil's Working Class

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Abstract Against the backdrop of the growing devaluation of the value of labor power and the persistence of the structural duality of the national education system, this article aims to analyze how profound inequalities in the Brazilian schooling process take shape nowadays. This discussion is supported by a set of empirical data from three state primary and secondary schools and one Youth and Adult Education center and highlights the conditions under which children and young people study, including the relationship between the process of social reproduction of their families and the logic underpinning the organization of pedagogical work in schools.

Keywords Social reproduction. Educational inequality. State education. Working class. Schooling.

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1 Introduction

Understanding inequality in the schooling process in Brazil requires examining the relationship between the social function of the school and processes of access to, retention in, and learning within basic education. Regarding this dynamic, two educational projects for new generations come into conflict: one aimed at reproducing existing social relations by adapting individuals to capitalist sociability, and another that confronts this sociability in the direction of its transformation. This historical dispute, however, takes place under conditions that do not pose a threat to bourgeois hegemony.

In a context marked by the widespread devaluation of labor power, rising unemployment and underemployment, and the reproduction of the structural duality of the national education system, which differentiates the education of children and young people according to social class, ethno-racial background, and place of birth, it is essential to understand how deep inequalities in the Brazilian schooling process are manifested today.

In this article, we analyze how children and young people's living conditions in Brazilian state schools (materialized in the social reproduction process of their families) and the pedagogical conditions within the schooling process (materialized in the logic of the organization of pedagogical work and in teachers' working conditions) create and shape students' relationship with study.

The axis guiding the analysis is social reproduction, which is inextricably linked to the mode of social production. According to Lefebvre (2000), social reproduction encompasses three interconnected processes: biological reproduction; the reproduction of labor power; and the reproduction of social relations of production within capitalist society. In this article, we address reproduction as it relates to the sale of labor power for the production of the means of subsistence of the proletariat, which requires meeting not only needs such as food, shelter, cleanliness, hygiene, health, affection, and care, but also schooling for children and young people to integrate into social life.

This article aims to discuss how schooling shapes the current conditions for the reproduction of labor power, which are marked by a vast reserve army of labor (Marx 2017) undergoing an ongoing process of devaluation. The reflections and syntheses presented here are drawn from a collective research project developed by the Centre for Studies on Transformations in the World of Work at the Federal

University of Santa Catarina.[1] The study is based on a literature review, an analysis of census and statistical data, and field research conducted in three primary and secondary schools and one Youth and Adult Education center in the municipality of Florianópolis, in southern Brazil, using observation, questionnaires, and interviews.

2 Schooling in Brazil as a Process of the Essential Qualification of Labor Power

Education has historically been fertile ground for idealist currents of thought. Within these perspectives, education, particularly schooling, is presented as a solution to complex social problems such as inequality, unemployment, environmental destruction, violence, and prejudice. From the other side of this socially detached perspective, education emerges as the entity held responsible for these very problems.

In *School and Democracy* (Saviani 1999), when focusing on the problem of educational marginalization, the author argues that such understandings constitute what is called "non-critical theories". These theories view education as autonomous from the social totality and, therefore, either as the cause of inequality in school performance or as having the potential to equalize performance regardless of objective conditions. By contrast, according to the author, "critical theories" are those that relate education to its social determinants:

> social determinants, that is, the socioeconomic structure that conditions the way in which the educational phenomenon manifests itself. (Saviani 1999, 17)

Understanding that education is part of the social totality means recognizing that individuals are educated according to the specific needs of each mode of production, so that they are qualified to act in the process of production and reproduction of the set of social relations.

It can therefore be argued that education is not something that precedes human activity, but rather takes place within the very act of production and reproduction of existing social relations. It is through social activity that individuals are educated, and this constitutes the decisive element in the educational process, according to Marxist Educational Theory (Suchodolski 1976). Marx and Engels (2007) had

1 Both internal and international migrants were considered. Antunes, Oliveira and Van der Laan (2025) use the concept of "uberized work". These data do not account for people experiencing homelessness, those living in urban or rural occupations, families living in overcrowded housing, individuals who are permanently hospitalized, or other related situations.

already pointed to this profound articulation in the Third Thesis on Feuerbach, noting that human beings shape the environment in which they act to the same extent that they are educated by it. Therefore, we must situate ourselves within the terrain of history to analyze the specificities of educational processes mediated through schooling.

In a study of the history of education in Brazil, Otaíza Romanelli highlights the condition of a country that, for four-fifths of its history, was both a slaveholding society and a colony of Portugal. The slave mode of production did not require schools to educate the mass of working subjects, as the relations of production themselves were sufficient for this purpose. Thus, the expansion of schooling in Brazil gained greater momentum only with industrialization, from the 1930s onwards, when the country sought development and modernization and began, for the first time, to promote compulsory attendance in the first four years of primary education. This expansion, although significant, was marked by structural limitations: an insufficient supply of school places, low performance within the school system, and marked social discrimination (Romanelli 2007).

According to Romanelli (2007), in 1970 only 30.13% of Brazil's population aged 5 to 24 were enrolled in education. Despite subsequent growth, this figure remained very low on the eve of the third millennium, and regional inequalities are stark throughout the entire schooling trajectory. In 1966, the dropout rate in the first year of primary school was 33.45%, and among those who managed to remain in school, only 22.77% completed primary education without failing a grade and having to repeat the school year, revealing the highly selective nature of the school system.

In light of this scenario of low levels of schooling, a high rate of illiteracy, widespread grade repetition, and the limited quality of the education system, it became a consensus that Brazilian education was underdeveloped. However, Romanelli (2007, 256) questions whether this supposed lag might not have had a "certain functionality, both for the political order and for the economic order". Brazil occupied (and continues to occupy) a subordinate position in the international division of labor; it is a dependent economy that plays a key role in the dynamics of international capitalism. Industrialization developed, with few exceptions, through the purchase of foreign technology at a high cost and required only elementary levels of worker qualification. Corresponding to this productive model is a particular pedagogical and political project.

Romanelli (2007) demonstrates that a school grounded in the development of science and of scientific and critical thinking does not align with this particular development project. Thus, Brazilian education is not lagging behind; rather, it corresponds to the type of qualification required for work and for political participation as demanded by peripheral and dependent capitalism.

In the 1980s, a period marked by the strengthening of the democratic field and the weakening of the dictatorship, approximately 30% of the Brazilian population was illiterate, and the country had a dual and fragmented education system. There were persistent and serious problems of access to schooling in rural and urban peripheral regions, as well as high rates of school 'dropout' and semi-illiteracy among those who did gain access to school. Nevertheless, this decade was significant for educational and social policies, albeit in a contradictory manner. With the end of the military-business dictatorship in 1985 and the promulgation of the 1988 'Citizen Constitution', compulsory schooling was progressively extended from the first to the eighth year of primary education (roughly ages 6 to 14). At the same time, a system of education funding was established, linking education to federal revenue. It was also during this period that the need to reform the National Education Guidelines and Framework Law (Lei de Diretrizes e Bases da Educação Nacional – LDB) was recognized, a reform that was ultimately implemented in 1996.

The 1990s were marked by the implementation of neoliberal policies, characterized by privatization and the erosion of limited rights gained under the newly enacted Citizen Constitution. During this decade, Brazil's subordination to multilateral organizations intensified, particularly concerning educational reforms and policies. Key reference points were the international guidelines established at the World Conference on Education for All and the recommendations of the Delors Report (*UNESCO 1996 – Education for the Twenty-First Century*). During this period, the concept of basic education was created, encompassing early childhood education, primary education, and secondary education (a total of 14 years), alongside efforts to universalize access to basic education. However, the foundations were also laid for neoliberal-oriented curricular reforms, such as the National Curriculum Parameters (1997), the National Common Curricular Base (2016-7), and the Upper Secondary Education Reform (2017).

It is evident that, even as the years of schooling and the length of the school day increase, the teaching of systematized scientific, artistic, and philosophical knowledge declines, making way for basic competencies linked to the world of work and the demands of maintaining the prevailing social order. Saviani (1999) argues that the more democracy is spoken about, the less democratic schools become. This argument is supported by data from our research, particularly in relation to the managerialist logic that dominates education systems. Schools and teachers are increasingly required to implement greater bureaucratization, undergo external assessments, carry out activities that fragment the teaching process, and adopt sophisticated forms of control through digital applications and platforms.

3 Analysis of the Conditions Under Which Children and Young People Study

In this section, we analyze how the living conditions of children and young people attending Brazilian state schools (materialized in the process of social reproduction of their families) and the pedagogical conditions within the schooling process (materialized in the logic of the organization of pedagogical work and in teachers' working conditions) create and/or shape children's and young people's relationship with study.

To this end, we draw on data extracted from field research involving five state primary and secondary schools and one Youth and Adult Education center in the municipality of Florianópolis, Santa Catarina. In this article, we selected data from three schools and the Youth and Adult Education center. The research included classroom observations, questionnaires administered to students and interviews with teachers and school leaders. Regarding the questionnaires, the analysis comprised 162 from the later years of primary education, answered by students from three 8th year classes and three 9th year classes, from the morning and afternoon shifts, covering the age range between 12 and 15 years; 362 questionnaires were administered in upper secondary education, applied in two schools and encompassing one class from each year (1st, 2nd, and 3rd year) in the morning, afternoon, and evening shifts, covering an age range between 15 and 19 years; and 42 questionnaires were administered in Youth and Adult Education, answered by students in the second segment (corresponding to the final years of elementary school), predominantly aged between 15 and 17 years, but covering an age range up to 25 years old. Concerning the interviews, 25 were conducted with teachers working in classrooms or holding management positions.

Based on the assumption that we are experiencing a process of the precarization of working-class living conditions (Antunes 2018), particularly in countries such as Brazil, which occupy a peripheral position in the global labor market, we present some elements that indicate the living conditions of students attending state schools. We begin with an overview of social inequality in Brazil **[tab. 1]**.

Table 1 Data on social inequality in Brazil

Population	203,080,756
Labor Force	140.8 million
Overall Unemployment	9.3%
Poverty[1] and Risk of Poverty	53.4%
Inequality (Gini)	0.518
Education (Average years of schooling)	9.9
Racial and Gender Inequality	70%

Source: Author's own elaboration based on the Demographic Census, IBGE 2023

1 The IBGE adopted the World Bank's monetary poverty thresholds, defining extreme poverty as US$ 2.15 per person per day and poverty as US$ 6.85 per person per day.

Data from the 2022 Demographic Census (IBGE 2023) provide an important, though not comprehensive, update on social inequality in Brazil, reinforcing the fact that poverty and inequality continue to have clearly defined class, racial, and gender dimensions. In our research, students' household income ranges between one and four minimum wages, with each family comprising, on average, three to four people living in the same household. In line with the poverty data reported by IBGE, the results from our sample indicate that 53% of students and their families were living in extreme poverty or at the poverty line in 2024, constituting a first and fundamental condition from which children and young people study in Brazil.

Another piece of data from Table 1 that helps to highlight educational inequalities concerns the average number of years of schooling of the Brazilian population: 9.9 years. This figure contrasts with the National Education Guidelines and Framework Law, which establishes 14 years of compulsory schooling, corresponding to ages 4 to 17. Therefore, it can be stated that living conditions influence the type of access to education, school retention, and educational development to which each individual is subjected, as well as their position in the world of work in the production and reproduction of their existence and in the maintenance of the capitalist system.

Current educational policies deepen school inequalities and educational duality, as differences in access, retention, and living conditions further segregate and/or exclude large segments of the population. Perocco (2012) states that educational inequality is directly linked to social class, ethnicity, and place of origin. These multiple inequalities make life precarious, marked by stigma and discrimination, and undermine and diminish opportunities for human development. In Brazil, we also identify this accumulation of inequalities, indicating that it is structural to capitalist society,

encompassing social, labor, income, housing, mobility, health, cultural, leisure, and educational dimensions.

3.1 The Social Reproduction of Students and Their Families

Who are the students who attend state schools in Brazil? What are the living and working conditions of their families like, and how do these conditions affect access to schooling, school retention, and learning? Given the specific context under investigation – three state schools and one Youth and Adult Education center in the municipality of Florianópolis – we analyze a set of data that enables us to address the questions outlined above.

Regarding place of birth, there has been a growth in the enrollment of immigrant students in schools, mainly from Venezuela, Haiti, and Bolivia. The number of enrollments of international immigrants increased from 41,916 in 2010 to 122,900 in 2022, especially in primary education and early childhood education.[2] Concerning internal migration within Brazil, there are greater difficulties in mapping enrollments. Nevertheless, the data reveal longstanding regional inequalities in the country, between rural and urban areas, as well as the intense mobility of workers, most of whom are in temporary employment.

According to the data collected in our research, in the later years[3] of primary education, only 27% of students were born in Florianópolis; among their family members, this figure is 28.6%. In Youth and Adult Education,[4] 27% of students were born in Florianópolis, as were 19% of their family members. In upper secondary education,[5] 56% of students are immigrants or children of immigrants, 33% are locally born but children of immigrants, and only 7% were born in the municipality, as were their parents.[6]

These data, allows us to draw some considerations and syntheses. The presence of immigrant students in schools has become a structural issue. Migration is increasingly temporary due to barriers

2 The IBGE adopted the World Bank's monetary poverty thresholds, defining extreme poverty as US$ 2.15 per person per day and poverty as US$ 6.85 per person per day.

3 In 2022, Brazil's Gini index was 0.518, indicating that the richest 1% of the population controlled nearly 20% of the nation's total income, whereas the poorest 50% accounted for only about 10%.

4 Black and mixed-race women comprise the most vulnerable group, representing 41.3%.

5 Panorama of Work in Brazil and Florianópolis (2023). Centre for the Study of Transformations in the World of Work – TMT/CED/UFSC.

6 The sample comprised 162 questionnaires administered to students in the 8th and 9th years at a state school.

to long-term settlement, whereby children and young people often experience multiple relocations and school trajectories. Emigration and immigration, in turn, represent two dimensions of the same reality; according to Sayad (2008), both express processes of expropriation and exploitation

Regarding the ethno-racial marker of identification among students, the educational modality with the highest proportion of Black students – 64%, according to our research – is Youth and Adult Education, which concentrates the largest share of students who are precarious workers, immigrants, and in situations of socioeconomic vulnerability. In the later years of primary education, 45% of students self-identified as Black, while in upper secondary education, this figure was 33%. It is noteworthy that many students reported that they "did not know" how to answer this question, which may indicate a historical process of concealment of self-identification with a "non-white" identity.

Concerning work, 56% of mothers are engaged in activities such as domestic work or work as cleaners, while 42% of fathers are employed in the construction sector (bricklayers, laborers, assistants) or in other temporary or informal jobs, many of which are influenced by the tourist season in Florianópolis. These occupations reflect the reality of a large portion of the region's working population, marked by low wages, employment instability, and, in many cases, the absence of labor rights. The high proportion of students – approximately 23% – who were unable to report their parents' occupation or income may also indicate temporary or informal employment or the absence of a stable income. We observed differences in types of work by gender, whereby mothers more frequently engaged in cleaning and domestic services, and fathers worked in sectors such as construction and transport, particularly through digital platforms and without formal employment ties.[7] This division of labor also reflects longstanding social and gender inequalities in our society.

The results of the questionnaires administered to students and their families, together with the interviews conducted with teachers, reveal that state schools in Brazil, especially in the most peripheral and impoverished neighborhoods, concentrate students whose families are engaged in low-skilled occupations, with low wages, long working hours, and a high degree of instability and insecurity. We may refer to this population, in Marx's terms, as relatively superfluous: those in completely irregular employment, constituting an inexhaustible source of available labor power. Their defining

7 The sample comprised 42 questionnaires administered to students in the second segment (6th to 9th years) of an Adult and Youth Education program.

characteristics are "maximum of working time, and minimum of wages" (Marx 2017, 718).

The form of "piece-rate wages", present at the early stages of the capitalist mode of production, has become increasingly entrenched in contemporary labor relations (for example, app-based delivery workers and drivers), and is also evident in the families of the students surveyed. This type of wage is measured by the "quantity of products in which the labor has embodied itself during a given time" (Marx 2017, 623), which leads workers to expend their labor power as intensively as possible.

Regarding the extension of working hours, this is observed among the students' parents; in the case of mothers, this is compounded by domestic labor. This situation is also evident among adolescents and young people themselves, contributing to school dropout, and to the need to attend evening classes or Youth and Adult Education programs. We observed that students are engaged in domestic activities: more than 50% of respondents in the later years of primary education (aged 13 to 14) and 90% of upper secondary students reported such involvement. Among the latter, 32% work in paid employment and assume some level of financial responsibility for their families.

Among teachers, the situation is no different. According to our research, they are overloaded with teaching duties, often responsible for multiple classes and hundreds of students. Some are required to commute to other schools or even take up employment in sectors outside education.

In *Modern Times, Ancient Hours*, Basso analyzes the causes and consequences for workers of the extension of working hours, the return to the past, to older forms of labor, together with the maximum intensification of working time, which means the "complete 'availability' of waged workers' lifetime to employers, rendering the boundaries between working time and overall lifetime increasingly uncertain" (Basso 2018, 17, Authors' transl.).

As a result, students have little time for other activities or for social interaction related to sport, culture, and leisure. Participation in associations, social movements, and youth groups is limited, with the highest levels of involvement occurring within religious institutions. The landscapes of these areas are neglected, including schools, parks, playgrounds, football pitches, and green spaces. Children and young people bear the brunt of many of the changes brought about by public disinvestment in education, social assistance, housing, healthcare, and public spaces.

According to the 2022 Demographic Census (IBGE), over the past 12 years, the municipality of Florianópolis has experienced a population increase of 31.27%. In the northern region of the city, where the Youth and Adult Education center and two schools included in our field research are located, this increase reached 61%. The

problem is that, by and large, population growth has not been accompanied by public policies, such as providing schools, health centers, sanitation, and urban infrastructure. Consequently, schools are subject to waiting lists and overcrowded classrooms; parents are often unable to secure places in schools in the neighborhoods where they live; queues for healthcare services are extremely long; the lack of sanitation and the disorderly expansion driven by real estate speculation have led to urban pollution; and public transport is expensive and operates on limited schedules.

In relation to working-class housing conditions, IBGE data from 2022 indicate that 20.2% of the Brazilian population lives in rented accommodation and 8.8% in dwellings provided free of charge. In the municipality of Florianópolis, the proportion of people living in rented housing reaches 28.3%.[8] In addition, IBGE estimates that 28.9% of the metropolitan population lives in rented properties whose cost is high in relation to their respective household incomes.

3.2 Teaching and Pedagogical Organization in Schools

The social reality experienced by students outside school does not disappear when they enter the educational institution; rather, it permeates it. It is the same individual, in their entirety, who becomes a student. Faced with this complex reality, particularly in a country such as Brazil, schools and education systems oscillate between disregarding students' living conditions, whether due to ignorance or powerlessness, and adapting schools and educational policies to the students' profiles. However, schools also produce specific conditions that shape children's and young people's relationship with study, materialized in the logic of the organization of pedagogical work and in teachers' working conditions. In this section, we aim to highlight what these pedagogical conditions are and how they function in determining students' relationship with learning knowledge.

As an initial synthesis, we understand that the social function of the school remains essentially the same, but there are ongoing changes that both intensify it and signal the possibility of a real, rather than merely formal, subsumption of pedagogical labor to capital. To support this position, we analyze some expressions of how the organization of pedagogical work has been carried out in the state schools investigated.

We understand that the organization of schoolwork is directly related to the social functioning of the school. Teaching how to

8 The sample comprised 362 questionnaires administered to students from two state schools.

think, providing access to critical formation, and to the foundations of the sciences remain accessible only to a segment of the ruling class; the duality of schooling persists. Thus, we find Manacorda's (2000) expression appropriate, insofar as one of the school's roles is to convey the 'rudiments' of human knowledge.

In Brazil, 80% of children and young people are enrolled in state schools (Brazil 2025). However, if we consider that a significant share of enrollment in the private sector consists of children and young people who do not form, and are unlikely to form, the ranks of the ruling class, it can be argued that Brazilian schooling has historically fulfilled the role of socializing the majority of the population into elementary and fragmented forms of knowledge – necessary and appropriate to the formation of labor power under capitalism.

This characterization of the social function of the school is essential to explaining why, even more than 25 years after compulsory basic education from the 1st to the 9th year was established, we still face a situation in which teachers understand that

> The best technology a school can offer is seeing that, after nine years, students can read, understand what they read, and write fluently. (Teacher A)

The expansion of schooling in Brazil has taken place through a process that further marginalizes school content, marked by its flexibilization, simplification, and fragmentation.

The current school structure, which maintains the logic of organizing subjects within a fixed timetable and allocating limited time to each subject (sometimes one or two lessons per week; 50-minute classes), tends to prevent a pedagogical relationship that allows for in-depth engagement with knowledge. Moreover, schools and teachers have little or no autonomy to alter this logic.

> I always had to come up with something I could start and finish in a single lesson […] because there was basically no continuity. So, I'd just try to do whatever I could within that time slot, and that was it. In the end, that's kind of how teachers have to organize things, right? (Teacher B)

In an attempt to ensure "intermediate satisfactions" (Snyders 1988) or some sense of continuity, the logic that organizes schoolwork induces teachers to design activities that can be started and completed within the time span of "a single lesson", as reported by the interviewed teacher. This requires simplifying the complexity of knowledge so that it fits within the class period. This organizational logic applies not only to subjects with a teaching load of one or two lessons per week but also to support or substitute teachers, who often enter

the classroom for a single lesson. Thus, while the school ensures continuity in terms of time spent in the classroom, its structure pushes towards discontinuity in relation to systematic engagement with knowledge.

There is an increasing emphasis on a curriculum logic structured around time spent in class, in which priority is given to being physically present at school and in the classroom, fulfilling tasks, assessments, and other requirements. This mode of organizing schoolwork, crystallized in its institutional machinery – textbooks, workbooks, curricula, and processes of platformization – is deliberately shaped by policy and capital, even though it often appears as an individual "choice" made by teachers. It points to a second function of schooling that remains highly relevant: disciplining and massification.

Enguita (1989) analyzes this articulation further between school and bourgeois society, identifying how the mode of organization of the latter induces a corresponding mode of organization within the school, including teaching processes, thereby constructing a school form that reproduces, in its own way, the logic of the broader social order. According to Enguita (1989), the bourgeois school form prioritizes obedience, constant assessment, competition, and hierarchization, while controlling time, space, and activity, thereby limiting students' participation in both school life and their own learning.

According to the author, and drawing on Marx's discussion of alienation in labor, in the bourgeois school the student is alienated from the labor process, from the means of labor, and – we would add – from the product of labor, insofar as the possibilities of accessing knowledge that reveals the structures governing the natural and social world are reduced. Davidov (1988) argues that the product of labor at school (the product of study) is the students' own formation (the knowledge they appropriate). Thus, we can say that our students are indeed alienated: they do not know whether they have learned or what they have learned; they do not know how to organize their own study autonomously; they carry out learning tasks always for others and not to learn something specific. Abstract labor has increasingly become concrete, both in teachers' work and in students' study activity.

In the current configuration of the school form, there has been an expansion of large-scale assessments. While they were initially designed to systematize information about education systems and were conducted on a sample basis, from 2005 onwards, they began to be applied on a census basis to all state primary schools. In 2025, in Florianópolis primary schools, a total of 12 tests determined by external assessments were administered. Teachers at one school reported that they spent three months preparing children for a single test, which highlights the conversion of the broader objectives of education into the preparation of students for performance in these

assessments. Hence, teachers perceive that the early years are "overwhelmed by testing" (Teacher C).

Moreover, these assessments determine what will be taught and how it will be taught. In recent years, a growing hegemony of multiple-choice question-and-answer logic can be observed from the very first year of primary education. This logic tends to foster a form of superficial thinking, in which answers must be quick and unambiguous, and learning content becomes synonymous with identifying one option from a list of pre-formulated answers.

Nevertheless, what this type of assessment measures does not correspond to effective learning. "Letting students move up grades has cut down on dropouts, but it still hasn't made sure they actually learn" (interview, Teacher A). Automatic grade progression means that students continue to follow the school timetable with their cohort, regardless of whether they have learned or acquired the basic knowledge needed to keep up with the group. This logic contributes to study activity appearing to students as something objectively independent of the effective appropriation of concrete knowledge.

Therefore, returning to Enguita's (1989) ideas, it is false to claim that the social function of the school is primarily to work with knowledge. The school educates through the experience to which it subjects students: exhausting routines; exposure to control and assessment; memorization; and a lack of meaning and motivation for learning – even when it draws on "rudiments of knowledge".

Discontinuity, as part of the logic of the organization of schoolwork, also manifests itself in the widespread use of teachers on temporary contracts and in the constant inflow and outflow of immigrant students. In the municipal education system of Florianópolis, out of a total of more than 2,050 teachers, around 51% are employed on a temporary basis (Educational Data Platform 2020), contradicting what is permitted by the National Education Guidelines and Framework Law (LDB 9294/1996). This situation hinders the formation of a consistent teaching staff within schools, weakening long-term ties with the school community and, consequently, the development of a coherent pedagogical project.

Thus, the school – similar to bourgeois society – has its social function marked by the separation between knowing and doing: students follow orders and carry out what they are instructed to do, just as teachers increasingly do what is prescribed for them, whether by textbooks or by contemporary teaching platforms. Teachers progressively lose autonomy over the management of pedagogical work and become subject to evaluation, surveillance, and control. As one interviewed teacher reports:

> It created loads of extra work […] opening the system, fixing any problems, clocking in and all that. You're stuck there thinking, right, is my system OK? Has it gone through? Is it up to date or not? […] The workload has also ramped up […] Now I have to worry about whether it actually went through, whether it was properly recorded. […] There's a real mental overload. It's constantly on your mind. (Teacher B)

The deep logic of school organization – graded, hierarchical, with fragmented content detached from life – is often not grasped by teachers and is beyond the reach of their everyday practice. Yet it tends to determine their activity, also appearing to education workers as something naturalized and eternal. As Marx noted (2017, 495),

> The machine does not free the labourer from work, but deprives the work of all interest […]. It is no more the worker who employs the instruments of labour, but the instruments of labour employ the worker.

The remodeling of school machinery, now enhanced by using platforms, subjected to constant assessment and oriented towards the fulfillment of targets, points to a new position for the teacher. Increasingly transformed into an appendage of the machine and subordinated to its dynamics, teaching is shifting from formal to real subsumption. This shift widens the divide between conception and execution in schoolwork and subordinates the concrete aims of teaching to the fulfillment of targets and goals that are ever more quantifiable and detached from students' real development.

4 Final Considerations

The data and reflections presented reveal the limits of the democratization of education in capitalist society. This leads us to reaffirm that the expansion of schooling in Brazil has not ensured the universalization of basic education, either in terms of certification or effective learning, suggesting that the function schools increasingly fulfill under the capitalist mode of production is less the socialization of systematized human knowledge and more the disciplining of students. We therefore conclude that the function fulfilled by the school within the capitalist mode of production is increasingly less that of socializing systematized human knowledge and increasingly one of discipline.

Education directed at the children of the working class – particularly the most impoverished sectors, Black populations, those living in peripheral areas, and immigrants – is directly linked to the current

demands of reproducing the future labor force, which must be educated for flexible production, uncertain, intermittent and insecure work. Subjects must be educated to accept the complete availability of their labor power, anywhere and at any time. A form of education oriented towards resilience and towards recognizing problems as learning opportunities is required, in line with the guidelines of Brazilian educational counter-reforms (Brazil 2017; 2018), focused on the development of socio-emotional skills.

As discussed, school inequalities are the result of social inequalities and, at the same time, reproduce them. Educational duality has historically marked the Brazilian education system and structures the provision of education according to social class. However, considering that free state schooling is an effective instrument for the democratization of education – as it does not select students according to economic, ethical or ideological criteria – it remains necessary to struggle for access, permanence and effective conditions of learning for working-class children and young people. Nevertheless, these possibilities are increasingly limited within a profoundly unequal society that selects according to class, ethno-racial origin and nationality, and in a context of an abundance of labor power and its consequent devaluation. As education does not have the power to create new conditions of human coexistence on its own, overcoming the current social relations of production becomes a necessary requirement.

The social function of the school and its organizational logic cannot be dissociated from the wider society. The school form is determined by the bourgeois social form, and breaking with this logic means transforming society itself. In our analysis, we cannot expect the school to produce equality within an unequal society, just as bourgeois society cannot construct a school that provides genuine theoretical education or omni lateral formation when it needs to train workers adapted to the demands of existing jobs. The task we face today is to transform the school in articulation with a radical transformation of society. Social struggle is profoundly educational for both older and younger generations and stands as an unavoidable condition if we wish to build a school that makes sense and effectively contributes to understanding the world and to becoming, in fact, subjects within it.

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Brazilian Agribusiness and the Ongoing Planetary Ecocider

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Abstract The agro-export system of commodities is responsible for one-third of global greenhouse gas (GHG) emissions. Besides being a major source of organism intoxication through the increasing use of pesticides, this system is primarily responsible for the ongoing annihilation of biomass and biodiversity. This article examines Brazil's insertion into this highly globalized system. As the world's largest consumer of pesticides, Brazilian agribusiness has been committing the greatest ecocide against our planet's biosphere since 1970. The ongoing destruction of the biosphere deepens national and international inequalities, accelerates imbalances in the Earth system, and increases climate, water, food, and health insecurity on a global scale. The article proposes four programmatic points for a political agenda capable of confronting the imminent existential threats looming over our societies.

Keywords North-South inequalities. Biodiversity loss. Wildfires. Ecocide. Food insecurity. Pesticides. European Union-Mercosur Agreement.

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1 Introduction

The globalized agro-export system is primarily responsible for the growing anthropogenic interference in the planet's biota. It is, in fact, the main driver of tropical forest destruction, soil erosion and biological impoverishment, pollution and unsustainable use of water resources, desertification, imbalances in hydrological cycles, the poisoning of organisms through the increasing use of pesticides, and the increased risk of new pandemics. It is also the second largest factor, after the burning of fossil fuels, in disrupting the climate system and accelerating global warming. The Emission Database for Global Atmospheric Research (EDGAR) states that "food systems are responsible for a third of global anthropogenic GHG emissions" (Crippa et al. 2021). Francesco Tubiello and his colleagues corroborated these estimates:

> Total GHG emissions from the food system were about 16 CO2eq yr−1 in 2018, or one-third of the global anthropogenic total. Three quarters of these emissions, 13 Gt CO2eq yr−1, were generated either within the farm gate or in pre- and post-production activities, such as manufacturing, transport, processing, and waste disposal. (Tubiello et al. 2021)

The globalized agro-export system and the energy system based on fossil fuel consumption are inseparable (not least because nitrogen fertilizers are produced from petroleum). The list of growing consequences of this system is long: global warming, increased food insecurity,[1] eutrophication and deoxygenation of aquatic environments, illness from exposure to pesticides and aerosols resulting from forest fires and sandstorms in parched soils, and a greater likelihood of zoonoses and epidemics or pandemics (Quammen 2012; Wallace 2020; Pontes 2020; Marques 2020), in addition to systematic violence against human groups attempting to defend their lands from the expansion of the agricultural frontier. The immense weight of the agro-export system in the deterioration of Earth's habitability conditions throughout this century is, therefore, undeniable. Containing this deterioration at levels that do not exceed the possibilities of human adaptation requires discontinuing this system with as much urgency as discontinuing the use and burning of fossil fuels. The contemporary utopia is the survival of our societies

1 According to FAO (2025): "It is now estimated that around 2.3 billion people in the world were in a situation of moderate or severe food insecurity in 2024, 335 million more than in 2019, before the pandemic, and 683 million more than in 2015, when the 2030 Agenda was launched".

throughout this pivotal century, and this utopia has become absolutely dependent on two intimately interdependent conditions: containing global warming and defending millions of species, on which we are existentially dependent, threatened with extinction above all by the globalized agro-export system. More than ever, the question Henri David Thoreau posed to his friend Harrison Gray Blake on the distant 20th of May 1860 is relevant: "What is the use of a fine house if you haven't got a tolerable planet to put it on? – if you cannot tolerate the planet it is on?" (Thoreau 1860, 111).

2 Unequal and Combined Precarization

Within this global process of deteriorating the planet's habitability, inequalities are accentuated as the aforementioned consequences intensify, with disproportionately different responsibilities. Regarding imbalances in the climate system, Jayati Ghosh and Joseph E. Stiglitz report that:

> The richest 10% of individuals account for 77% of the carbon emissions associated with private capital and 47% of consumption-related emissions, while the poorest half contribute just 3% (and 10% of consumption-based (emissions). Climate change also hits the poor hardest: measured relative to their income, the bottom 50% bear about 75% of global climate-driven income losses. (Ghosh, Stiglitz 2026)

Obviously, in economic terms, the richest countries (or the richest of the poor countries) tend to lose more in absolute terms, precisely because they have more wealth to lose. But in relative terms, the economic losses of poor countries (or the poorest of the richest countries) are much greater. As the World Inequality Report 2026 notes:

> While absolute losses are higher in richer households, simply because they earn and own more, the relative impact on income and assets is vastly greater for poorer groups. A single flood, drought, or storm can erase years of accumulated savings, while for the wealthy, such shocks typically represent temporary financial setbacks. (Chancel et al. 2026)

But there is also the other side of the coin. The richest countries, located predominantly in the northern latitudes where the continental landmasses are concentrated, are warming faster than the global average. North America is warming in the twenty-first century (2001-24) at a rate of 0.37°C per decade, that is, almost 50% faster

than the global average (NOAA 2024), and Europe is warming twice as fast as the global average, as shown in Figure 1.

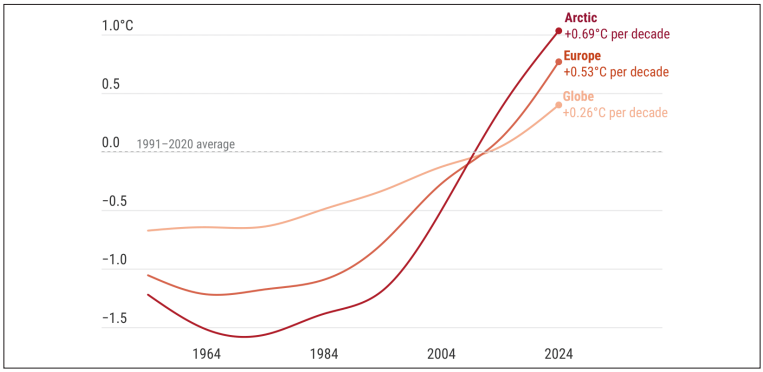

Figure 1 Average global warming in Europe and the Arctic for the period 1991-2020 and warming rates per decade for the period 1995-2024. In each decade during these thirty years, the average global warming rates per decade were +0.26°C (global). In Europe, however, it was +0.53°C and +0.69°C per decade in the Arctic. Source: Copernicus 2025a

In 2024, Europe temperature was 1.47°C above the average for the 1991-2020 reference period, and 2.92°C above the 1850-1900 level (Copernicus 2025b). If the current rate of warming on that continent is maintained per decade (+0.53°C), its population will have to endure the unprecedented impacts of warming of about 3.5°C on average annually by around 2035. The same can be said of North America (+0.37°C/decade between 2001 and 2024), where the increased impacts of current warming – hurricanes, floods, droughts, colossal fires, and heat waves – are already causing unprecedented deaths and suffering. Even though the economic resources of rich countries are considerable, their possibilities for adapting to regional warming are very limited, given the narrow capacity of human organisms to regulate their body heat. Therefore, in this second quarter of the century, the impacts of global warming will be felt more violently in the northern hemisphere than in the southern hemisphere. This is all the more true because European countries are now sacrificing crucial investments in social welfare and climate adaptation in favor of an unprecedented escalation in their military budgets.[2]

2 According to the SIPRI (2025): "Several countries in Central and Western Europe saw unprecedented rises in their military expenditure in 2024. […] Germany's military expenditure increased by 28% to reach $88.5 billion, making it the biggest spender in Central and Western Europe and the fourth biggest in the world. Poland's military spending grew by 31% to $38.0 billion in 2024, representing 4.2% of Poland's GDP".

3 Inequality in the Loss of Socio-Environmental Heritage

On the other hand, it is undeniable that, in terms of losses to socio-environmental heritage, tropical countries are already suffering and will suffer much more than northern countries. Three factors of inequality can be mentioned here. The first is obvious: in absolute terms, tropical countries have much more to lose in terms of biodiversity simply because they concentrate much more biodiversity. Just to give an example of the richness of this biological heritage, "as many tree species can be found in a single hectare of tropical forest as in the entire native Western European tree flora" (Cooper et al. 2024).

The second factor contributing to inequality between North and South, in terms of socio-environmental assets, is caused by the increasing globalization of the agro-export system. In fact, by importing agricultural commodities from tropical countries (especially soybeans, palm oil, beef and timber), rich countries export their species extinction rates to the agricultural exporting countries of the Global South. As pointed out by Alex Wiebe and David Wilcove, "globalization increasingly allows countries to externalize the environmental costs of land use, including biodiversity loss". The authors quantified the loss of wildlife habitat in agricultural commodity-exporting countries caused by imports from 24 wealthy countries that imported these commodities between 2000 and 2015:

> On average, the 24 countries caused 15.2 times greater international biodiversity losses than domestic biodiversity losses over the study period, although there was considerable variation between countries, spanning five orders of magnitude. Outside their borders, the 24 countries together were responsible for an average of 13.3% of the total range loss experienced by any forest-dependent vertebrate species globally during the study period, in addition to the biodiversity loss they each caused domestically. (Wiebe, Wilcove 2025, 390)

Since 1961, the authors further state, the areas of agricultural commodities predominantly destined for export have more than doubled the areas of crops for domestic consumption. In the case of Brazil, since at least the 1970s, the production of agricultural commodities for export has been by far the main driver of environmental destruction, followed by logging, also largely destined for export. In 2022, Josep Borrell, then High Representative of the European Union for Foreign Affairs and Security Policy, stated in a speech at the European Diplomatic Academy in Bruges:

> Yes, Europe is a garden. We have built a garden. Everything works. It is the best combination of political freedom, economic prosperity and social cohesion that the humankind has been able to build – the three things together. […] The rest of the world […] is not exactly a garden. Most of the rest of the world is a jungle, and the jungle could invade the garden. (EEAS 2022)

The metaphor used by Borrell can be read in reverse and more literally. Due to its insatiable demand for commodities from agricultural exporting countries, the European garden is invading and destroying the world's tropical forests, including the largest of them all, the Amazon rainforest.

The third factor contributing to inequality between rich and poor countries, regarding the loss of socio-environmental heritage, is equally quantifiable and has an unequivocal implication for increased socioeconomic inequality. Given that the populations of agricultural exporting countries are poorer and more self-sufficient in terms of food, they will suffer more from the impacts of the combination of declining biodiversity and increased climate risks on their food crops, directly affecting their prices. In 2024, the vast majority of the Brazilian population with family incomes of up to 1.5 minimum wages (R$ 2,280.00 or about 360 euros per month) spent almost a quarter (22.6%) of their family budget on food. This is a worsening trend because, even with the recent increase in the minimum wage above inflation rates, in 2018 food represented 18% of that budget for this majority income group. This is due to food inflation caused, at least in part, by agricultural losses resulting from the intensification of extreme weather events (Almeida, Vista 2025). In Brazil, a huge increase in these extreme weather events has been observed in recent years, with an alternation of floods, droughts and fires, a phenomenon known as Hydroclimate Whiplash. This is not solely, nor primarily, due to global warming, but basically to the destruction of forests, the main regulator of the climate in the South American continent and especially in Brazil.

4 Threats to the Exceptional Richness of Brazilian Biodiversity

The Conservation International classified 17 countries on the planet as biologically megadiverse. A megadiverse country must have at least five thousand endemic species of vertebrates (non-fish) and marine ecosystems. These countries are home to at least 70% of the world's species, as reaffirmed in the Declaration of this Group of 17 Countries, drawn up at COP15 on Biodiversity in 2022 in Canada (LMMC 2022). Brazil leads this list. Figure 2 shows that, of these 17

countries, five are Amazonian (Bolivia would be the sixth megadiverse Amazonian country if it had marine ecosystems).

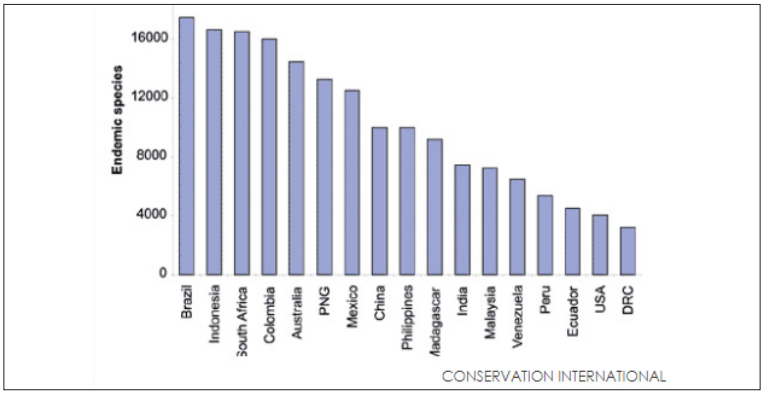

Figure 2 Number of endemic vertebrate species (non-fish) in the 17 megadiverse countries. Source: Purton 2024

Brazil's immense biological diversity goes hand in hand with its exceptional civilizational diversity, because, just to give an example, among the indigenous peoples of the Amazon are found at least 50 of the 125 isolated languages in the world (SPA 2021). But this biological and civilizational richness is increasingly threatened by Brazilian agribusiness and its integration into the international agro-export system. Regarding biological richness, according to the Brazilian Biodiversity Information System (SiBBr), Brazil harbors approximately 15% to 20% of the world's biodiversity. Data from 2023 from the Brazilian Institute of Geography and Statistics (IBGE) estimate the existence of 50,313 known plant species and 125,521 known animal species, totaling 175,564 described species (IBGE 2023). That being said, according to assessments from the Red Lists of endangered species of the Chico Mendes Institute for Biodiversity Conservation (ICMBio) and the Rio de Janeiro Botanical Garden (CNCFlora/JBRJ), the deterioration of biodiversity in Brazil is nothing short of catastrophic. In 2022, CNCFlora/JBRJ assessed 7,524 plant species (6,071 endemic to Brazil). This assessment classified 3,213 plant species as threatened with extinction, with 684 critically endangered. Therefore, approximately 43% of the assessed species of Brazilian flora are threatened with extinction. In total, if we add the animal and plant species assessed by the two institutions (ICMBio and CNCFlora/JBRJ), 4,467 species are threatened with extinction in Brazil, with 1,044 critically endangered.

5 The Expansion of the Agricultural Export Frontier is the Main Driver of Brazil's Destruction

Until 1970, five of the six Brazilian biomes (the Amazon, the Cerrado, the Pantanal, the Caatinga, and the Pampas) were still largely intact. Only the Atlantic Forest had suffered systemic destruction, especially since 1850, but even in this biome, destruction accelerated significantly after 1970. Since the 1970s, with the progressive globalization of the food system, the overwhelming impact of the agricultural export economy in tropical countries has been devastating this socio-environmental heritage at breakneck speed. During the years of the dictatorship (1964-85), especially as a result of the opening of the Trans-Amazonian Highway from 1970 onwards, the Amazon rainforest and the peoples who had inhabited it for millennia were victims of unprecedented ecocide and an attempted genocide, to make way for commodity production for the international market, especially minerals, soybeans, and cattle. The Brazilian military dictatorship was never tried for the documented massacre of more than eight thousand indigenous people, although estimates suggest a much higher number. The National Truth Commission (Comissão da Verdade) on the crimes of the dictatorship, whose work concluded in 2014, warned that the real number of indigenous people killed during the dictatorial period "must be exponentially higher, since only a very restricted portion of the affected indigenous peoples were analyzed and there are cases where the number of deaths is high enough to discourage estimates" (Brasil, Farias 2014). The dictatorship's attempt to perpetrate an indigenous genocide – resumed, moreover, during the years of Jair Bolsonaro's presidential term (2019-22) – was then proudly proclaimed as a sign of progress. In 1976, for example, Maurício Rangel Reis, Minister of the Interior under General Ernesto Geisel, declared: "The Indians cannot impede the passage of progress. […] Within 10 to 20 years there will be no more Indians in Brazil" (MPF 2017).

With the end of the dictatorship in 1985, however, the destruction of the country did not diminish. Data from MapBiomas shows that in the last 40 years alone (1985-2024), Brazil lost, mainly to the expansion of the agricultural frontier, more than 1,117,000 km² of natural areas (an average of more than 28,000 km² per year). This is approximately equivalent to the combined areas of metropolitan France (543,940 km²), Germany (357,022 km²), and Italy (302,073 km²). In those 40 years alone, 702 municipalities in the country ceased to have predominantly native vegetation (MapBiomas 2025). Also according to MapBiomas, between 1985 and 2023, more than 90% of the deforested areas in the Brazilian Amazon were initially used for the opening of pastures for cattle. Here are the numbers for this expansion of pastures. In 1985, at the end of the dictatorship,

they had already replaced 127,000 km² of forests in the Brazilian Amazon. By 2023, they had jumped to 590,000 km², an area larger than the combined areas of metropolitan France (543,940 km²) and Belgium (30,688 km²) (MapBiomas 2024).

6 Forest Destruction by Fire and Loss of Water Surface Area in Brazil

The interaction between deforestation, droughts, fires, and loss of water surface area is well known. On the one hand, fires are the final stage of forest destruction by agribusiness, and on the other hand, droughts and fires increase tree mortality and make remaining tropical forests more vulnerable to new fires, which, in turn, will become even more destructive. As a consequence, Brazil is drying out, the level of many of its rivers is decreasing, and its soils are becoming more arid. As MapBiomas shows, between 1985 and 2024, "all biomes lost water surface area, with the exception of the Atlantic Forest, due to the creation of reservoirs and hydroelectric dams" (MapBiomas 2025). Antonio Donato Nobre explains the direct relationship between deforestation and increased aridity:

> Forests function as the beating heart of the hydrological cycle. Trees transpire vast volumes of water vapor, which rises and rapidly condenses into clouds, aided by hygroscopic cloud-seeds also emitted by the plants. This intense condensation causes an abrupt drop in atmospheric pressure, which creates a powerful, natural suction force that pulls humid air from the oceans deep into continental interiors. (Nobre 2025)

A study on the evolution of 81 river basins in the Cerrado biome between 1985 and 2018 proves that direct impacts by large-scale deforestation oriented to the production of irrigated agricultural commodities have more significantly impacted river flows than climate changes:

> We estimated an average decrease of 8.7% and 6.7% in the streamflow due to deforestation and climate changes, respectively. Most of the observed changes (56.7%) were due to land use and land cover changes and occurred in recent decades. […] By assuming the current deforestation rates, we predicted […] a decrease of 33.9% of the river flows in the study region. It will cause severe streamflow discontinuity in many rivers and strongly affect agricultural, electrical power production, biodiversity, and water supply, especially during dry seasons in that region. (Salmona et al. 2023)

Figure 3 shows the evolution of primary forest losses in Brazil between 2002 and 2024.

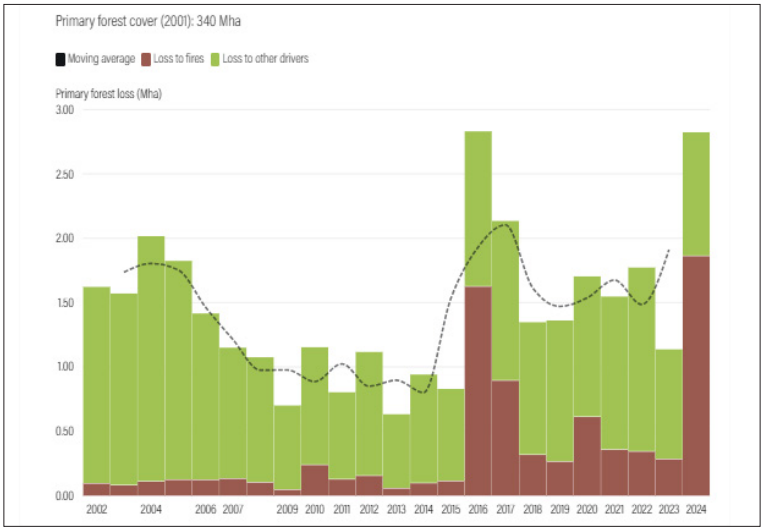

Figure 3 Loss of primary forest cover in Brazil between 2002 and 2024 in millions of hectares (Mha). In each column, the lower segment represents loss due to fire. Source: Weisse, Goldman 2025

In 2024, fire was responsible for 67% of the loss of primary forests in Brazil. In 2023, this loss was 11,400 km² and in 2024, 28,200 km². Thus, in just this two-year period, Brazil lost 39,600 km² of primary forests, an area almost equivalent to that of the Netherlands (41,865 km²). The destruction of these forests and the contribution of fires (99% of which are criminal) to this destruction increased significantly from 2016 onwards. This is due to the dismantling of environmental governance by the advance of the far-right in the executive and legislative branches of the country (Gatti et al. 2023). In 2025, MapBiomas Fogo revealed that 2.06 million km², about 24% of Brazilian territory, burned at least once between 1985 and 2024, and this year, for the first time, forests were the main victims of fires, with a record value of about 77,000 km² of forests affected by fire, or 287% above the historical average for this 40-year period (Alencar et al. 2025). Meanwhile, satellites from the National Institute for Space Research's (INPE) detected a total of almost six million (5,931,368) fire outbreaks in the country between 1998 and 2024 (INPE 2024).

The Pantanal biome is being destroyed by the agro-export system. The world's largest wetland, the Pantanal was classified by the United Nations in 2000 as a World Heritage Patrimony of Humanity (World Heritage) and Biosphere Reserve. In 2020 alone, the fires in this biome, demonstrably criminal in origin, killed at least 17 million

animals. On average, the fire killed more than 217 vertebrates per square kilometer (Tomas, Berlinck, Chiaravalloti et al. 2021). A huge number of photos of charred or severely injured animals visually document one of the greatest ecocide crimes in the entire history of Brazil. The particulate matter released by the burning of biomass has also been a significant cause of death and illness in human and non-human organisms, even in regions far from the fire outbreaks.

7 The Increased Use of Pesticides

Another key factor in biodiversity loss, death, and illness of organisms is the increasing use of pesticides by agribusiness. According to the FAO, pesticide consumption in Brazil more than quintupled between 2000 and 2021. In 2000, Brazil consumed 141,130 metric tonnes (t) of pesticides, placing it as the third largest consumer of pesticides in the world, well behind the consumption of the United States (430,005 t) and China (250,632 t). In 2021, Brazil became the world's largest consumer of pesticides, with a consumption of 719,507 metric tonnes. In 2021, Brazil's population represented about 2.5% of the world's population, but its pesticide consumption represented about 20% of global poison consumption (3,535,375 t). This consumption is greater than the combined consumption of pesticides in Europe (505,157 t) and Africa (203,580 t) (FAO 2023, 136). Figure 4 shows that from 2017 onwards, the release of new pesticides took a leap in scale from 2016 and has since increased steadily, with the sole exception of 2023, reaching 725 new products in 2025.

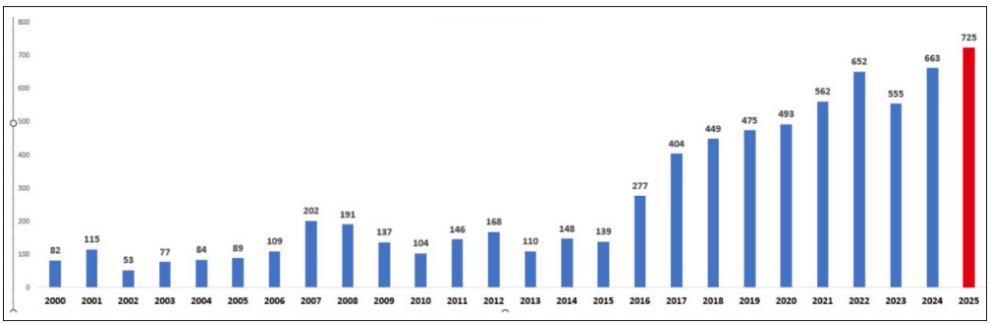

Figure 4 Pesticides released annually in Brazil between 2000 and 2025 (in the latter year with data from February to December 2). Source: Fernandes 2025

8 Deforestation and Increased Health Insecurity

The inequality between North and South is also evident from another angle of analysis. By imposing a drastic reduction in global greenhouse gas (GHG) emissions, the Covid-19 pandemic offered the last opportunity to contain average global warming to 1.5° C above the pre-industrial period. However, from 2023 onwards, these emissions have exceeded pre-pandemic levels. Not only have we lost this last chance, but global warming and the destruction of nature caused by the expansive functioning of the globalized agro-export economy raise fears of a veritable epidemic of anthropogenic epidemics or pandemics, including yellow fever, Zika, dengue fever, and Chikungunya. The resurgence of these epidemics is, in fact, anthropogenic, since global warming and the globalization of the economy favor the reproduction and geographic expansion of zoonotic vectors, among which are insects of the genus *Aedes*: "at temperatures above 30°C, for example, females lay three times more eggs than at 20°C. Furthermore, the larvae hatch in half the time when the temperature rises from 20°C to 30°C" (Lopes 2024). Another factor, besides climate, is the destruction of forests. "There is a single species that is responsible for the COVID-19 pandemic – us", warn Josef Settele and colleagues (2020), and continue:

> Rampant deforestation, uncontrolled expansion of agriculture, intensive farming, mining and infrastructure development, as well as the exploitation of wild species have created a 'perfect storm' for the spillover of diseases from wildlife to people. (…) Future pandemics are likely to happen more frequently, spread more quickly, have greater economic impact and kill more people if we are not extremely careful about the possible impacts of the choices we make today. (Settele, Díaz, Brondizio, Daszak 2020)

9 Conclusion

Luciana Gatti and colleagues show that the Amazon rainforest is no longer a carbon sink through photosynthesis, but has become a source of CO_2, indicating that the mortality rate of its trees has exceeded its growth and regeneration rate. The rate of carbon release by the Amazon rainforest in its Brazilian portion more than doubled in the years 2019-20 compared to the period 2010-18 (Gatti et al. 2023). After half a century of destruction, the machinery of disaster is accelerating and will have catastrophic impacts not only on Brazil, but on the habitability conditions of the planet as a whole.

Historically, that is, since 1850, Brazil has been the fourth largest emitter of carbon dioxide, mainly due to the almost complete

destruction of the Atlantic Forest, which originally covered 1,300,000 km², and, since 1970, in other Brazilian biomes (Evans 2021). But, regarding the impoverishment of the planet's biota, Brazil occupies an unrivaled position. It is necessary to bear in mind a central fact in the history of this country, not always properly evaluated. In all of human history, no society in any country or region of the planet has destroyed so much nature in such a short time as the machinery of the Brazilian agro-export economy in the last 55 years (1970-2025). And it is important to note here an aggravating factor. It is not just about the colossal magnitude and lightning speed of the destruction, but about a process of devastation concentrated in a historical period in which the concept of ecocide had already spread internationally and when science had already been loudly warning about the catastrophic consequences of the destruction and degradation of the planet's forests.

But this unprecedented crime of ecocide must be understood within a broader context, namely Brazil's insertion into the global market for agricultural commodities, in which importing countries participate, including the United States, China, the countries of the Middle East, and Europe. Viewed through this wide-angle lens, supply and demand complement each other in the ongoing process of the sixth mass extinction of species. The imminent approval of the European Union-Mercosur Agreement will only accelerate the destruction of what remains of the biosphere. And in this sense, Europe, which exports pesticides to Brazil that it prohibits in its own territory and which sustains the financial machinery of destruction, is a direct accomplice to the crime of ecocide and the growing existential threat to the forest peoples of South America. It is necessary to return for a moment to the aforementioned metaphor of the "garden-jungle" antinomy evoked by Borrell in 2022. The most salient aspect of Western civilization in this third decade of the twenty-first century is its absolute lack of sense of guilt regarding the malignancy of its actions on the non-European world. In individuals, the absence of a guilty conscience is one of the typical traits of a psychopath. In a civilization, it reveals astonishing levels of narcissism and lack of empathy.

That being said, given the global emergency, it would be even more disastrous to waste time on accusations. The current political agenda is absolutely global and requires, above all, a united front in the face of imminent existential danger. This united front can be based, in my view, on four programmatic points:

a. Democracy, understood as participatory popular sovereignty and as effective control of rulers by the ruled, has the power to overcome the corporate and financial oligarchies that control the destinies of our societies. Politics and the deepening of democracy constitute the only valid and possible negation of injustice, anomie, and war;

b. Societies have the capacity to understand their own challenges, however complex they may be, and this understanding is a fundamental step in the process of addressing them. Rational collective decisions can prevail over the aggressive impulses of our species;
c. The social question and the ecological question are inseparable. In the twenty-first century, they have become one and the same issue. In other words, every social problem can only be considered solved if it results, *at the same time*, in a decrease in the anthropogenic impact on the Earth system and in a decrease in inequalities between humans and between them and other species;
d. Solving problems of the magnitude of those that confront us today implies abandoning gradualism and accepting the challenge of undertaking a civilizational rupture, with its high and inevitable risks, given the inherently conflictual nature of the historical process. These ruptures, however, will only be possible and effective if they are political, that is, without the intervention of the military, a primitive and parasitic sector of society that can and must become extinct in the course of this civilizational mutation.

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Brazilians in Motion: Migration, Labor, and Social Reproduction in Japan

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Abstract The article analyzes migratory flows through the articulation of the categories of gender, race, and social class. In light of the continuous growth of international migration, taking the Brazilian case as an example, it is argued that this phenomenon cannot be understood solely through individual motivations or isolated labor market imbalances, but must be situated within the contradictory articulation of capital's social reproduction. Drawing on Social Reproduction Theory, the text examines how the demographic crisis – marked by low fertility rates and population aging in core countries – drives the demand for immigrant labor, while simultaneously relying on historically constituted gendered and racialized inequalities. The case of the migration of Brazilian descendants of Japanese immigrants to Japan is analyzed as a paradigmatic example, demonstrating how immigrant labor is incorporated under precarious conditions, detached from the costs of its social reproduction, and subjected to specific forms of exploitation, racial discrimination, and xenophobia. The article concludes that international migration functions as a partial response to the crises of capitalist social reproduction, while at the same time intensifying class, gender, and racial inequalities in both countries of origin and destination.

Keywords Labor. International Migration. Oppression. Social Reproduction Theory. Japan.

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1 Introduction

According to estimates by the United Nations (UN), in 2024 there were approximately 304 million international migrants worldwide. Naturally, this figure is not limited to movements associated with labor mobility. Natural disasters, such as earthquakes and floods, internal conflicts and the consequent production of refugees, among other factors, also contribute to migratory flows. In 2000, there were 173 million migrants, and in 2010 the number reached 211 million. Nevertheless, international labor migration remains significant, and the continuous growth in the number of international migrants constitutes both a consolidated trend in the global context and a symptom of dynamics originating in the world of work.

In Brazil, a similar scenario can be observed. The country has recorded an increase in the presence of immigrants, as well as in the number of Brazilians leaving the country, in line with this broader trend. According to the International Migration Observatory (Observatório das Migrações Internacionais), there was a significant rise in applications for residence in the country, increasing from 105,000 in 2013 to 1.2 million in 2023 – an increase of more than tenfold in volume (Oliveira 2024). Brazilians have also been migrating in greater numbers, with 4.9 million Brazilians living abroad in 2023, compared to 1.9 million in 2012 (Brasil 2024).

In this context, in our view, the migratory phenomenon proves to be paradigmatic in that it reveals certain assumptions and tendencies of contemporary capitalism, such as: inequalities internal to national labor markets; the persistence of the sex-racial division of labor under capitalism; the intensification of this division through the migratory process; the continued relevance of Marx's concept of the relative surplus population;[1] and the instrumentalization of migration for far-right political agendas, among others. For these reasons, an analytical framework focused on migratory flows becomes particularly insightful. From the perspective of labor relations and working conditions, and considering the immigrant worker as

1 We understand that immigrant workers play the role of compressing local wages, while also experiencing economic fluctuations earlier than the rest of the population, thus fulfilling the function of a relative surplus population, according to Marx's formulation, who argues that "surplus population of workers is a necessary product of accumulation or of the development of wealth on a capitalista basis, this surplus population also becomes, conversely, the lever of capitalist accumulation, indeed it becomes a condition for the existence of the capitalist mode of production. It forms a disposable industrial reserve army, which belongs to capital just as absolutely as if the latter had bred it at its own cost. Independently of the limits of the actual increase of population, it creates a mass of human material always ready for exploitation by capital in the interests of capital's own changing valorization requirements" (Marx [1867] 1976, 784).

a "prototype of the flexible worker" (Basso 2013), the analysis of immigrant labor sheds light on recent transformations, including increasing informality, overrepresentation in platform-based work,[2] and the intensification of multiple forms of oppression, among other mechanisms through which inequalities are produced.

Thus, in this article, we analyze how immigrant labor is intertwined with gender and racial oppression, considering that such forms of oppression both shape and are intensified by the migratory process. To this end, we draw on Social Reproduction Theory, which helps us to understand how the social reproduction of capitalism makes use of international migration as a source of labor at virtually no cost (McNally, Ferguson 2015). We therefore present examples of Brazilian migration to Japan, among other cases, in order to examine how the production of labor power – an element central to the reproduction of capital – is placed at the core of the debate. The guiding questions of this article include how social reproduction functions as a determinant driving international migration, and in what ways racial and ethnic inequalities are intensified through the migratory phenomenon.

2 International Migration: Labor, State, and Inequalities

Sayad (1998) reminds us that, historically, the migratory phenomenon has been treated as a question or a problem to be solved, frequently associated with issues such as housing, labor, crime, or other social adversities. Expressions such as the immigrant housing question, the immigrant labor question, or the immigrant education question illustrate this framing, which has repeatedly been approached as an obstacle. In recent years, the rise of conservative and far-right governments in various countries has further emphasized this character by criminalizing and persecuting undocumented immigrants. Similarly, the immigrant question has become a prominent feature of political discourse during periods of economic recession. It is worth noting that the relationship between economic crises and the spread of nationalism is by no means new in history (Anderson 2015).

In the case of Brazil, there exists a narrative directed both inward and outward that presents the country as a receptive and welcoming nation for foreigners. Nevertheless, to cite a few examples, the Foreigner's Statute [Estatuto do Imigrante], which remained in effect

2 For an overview of the debate on the platformization of work and immigration, see: *Migrant labour in the gig economy: The intersection of migrant labour, platform capitalism, and resistance* (2025).

from 1980 to 2017, reproduced exclusionary and punitive principles toward immigrants (Quintanilha 2024). This law established a broad set of circumstances that authorized the compulsory removal of foreigners, such as threats to national security, political or social order, public morality and tranquility, as well as to the popular economy, among other forms of control and surveillance (2024, 232). Practices such as vagrancy, begging, or violating specific legal prohibitions were also subject to sanctions (232). From a legal perspective, there is a normalization of unequal treatment directed exclusively at immigrants.

When examining the labor market, immigrants positioned in the low-skilled segment – which is the predominant condition among the foreign population in Brazil – often find employment with limited social protection, much of it characterized by informality and precariousness, particularly when they are in an undocumented migratory status (Villen 2015).

In general, the racism inherent to the capitalist mode of production in Brazil manifests in an intensified form, segregating, oppressing, and precarizing the living conditions of the Black population as a whole. Focusing solely on the labor dimension, in 2024 Black women earned 47.5% less than non-Black men (Brasil 2024), highlighting the persistence of racism as an "ideological weapon of domination", as noted by Clóvis Moura (1994). Thus, while it is true that the Brazilian labor market is structurally polarized, unequal, and highly informal, immigrants face additional layers of discrimination, racism, and xenophobia – or xeno-racism (Faustino, Oliveira 2021) – on top of the stereotypes and prejudices directed specifically at them, especially when originating from peripheral countries.

Parallel to the inflow of immigrants, the emigration of Brazilians to other countries has intensified, driven by labor market inequalities and a sense of social insecurity in the country. Regarding the history of migration in Brazil, it can be said that it has gone through different periods and assumed diverse characteristics over time. During the first half of the twentieth century (and part of the nineteenth century), Brazil was characterized as a receiving country for immigrants, as a result of racist policies (Seyferth 2002) aimed at whitening the population during a period of economic industrialization.

Between 1950 and 1980, from a demographic perspective, Brazil could be characterized as having a closed population (Patarra, Baeninger 2006), with population growth depending on internal factors. This scenario only began to change from the 1980s onward, when Brazil started to experience a significant outflow of emigrants. According to Patarra and Baeninger (2006), the economic recession experienced by the country during this period, among other factors, significantly affected the number of Brazilians who went abroad. For them, these emigrants sought "a form of social mobility truncated

within the country during the years of the so-called lost decade, primarily heading to First World countries" (2006, 86).

The factors that attract and push immigrants – although embedded within the very sociometabolic system of capital (Mészáros 2002) – undergo changes, gaining significant momentum with the rise of neoliberalism. In the 1990s, Brazil's high rate of informality (IPEA),[3] declining real wages, and the flexibilization and precarization of work worsened the conditions for the production and reproduction of life for the vast majority of Brazilians, particularly affecting the impoverished working class, with an even greater impact on women and the Black population.

The main destinations for Brazilian emigration have been the United States, Portugal, Canada, Italy, and Japan. Since the 1990s, Japan has become one of the countries most in need of immigrant labor and has looked to Brazil as one of its primary sources. Brazil is home to the largest *Nikkei* population (people of Japanese descent) outside Japan, totaling around 2 million individuals. Thus, the combination of Brazil's economic recession in the 1990s, Japan's labor shortages, the country's aging population, and other factors – each rooted in structural inequalities – created favorable conditions for the emergence of a migratory flow that has persisted for over three decades.

In our view, the Japanese case becomes paradigmatic because it links the state's efforts to meet an economic demand – that is, the shortage of labor resulting from a crisis of social reproduction – with the consequences of this migration, which ultimately intensify gendered and racialized oppressions. We understand that analyzing the genesis and constitutive mechanisms of migratory processes reveals the centrality of gender and race in these phenomena, making it essential to understand the dynamics of social production and reproduction, thereby explaining the persistence of inequalities both within and between countries.

3 Migration and the Population Question

In 1990, Japan amended its Immigration Control and Refugee Recognition Act (*Nyūkanhō Kaisei*, 入管法改正), allowing the entry of descendants of Japanese nationals up to the third generation. This move initiated the *dekasegi* phenomenon, characterized by the migration of Brazilian individuals of Japanese descent (*Nikkei*), which currently exceeds 211,000 residents in the country. The opening of the borders coincided with Japan's so-called population issue, marked by low fertility rates, an aging population, and difficulties in

3 Institute for Applied Economic Research (IPEA).

generational replacement, resulting in labor shortages across several strategic sectors of the economy.

Compared to other core capitalist countries, Japan has historically had a limited tradition of immigration, with the foreign population never exceeding 2% of the national total (Morris-Suzuki 2006). Nevertheless, the growing difficulty in replenishing the labor force necessary for the reproduction of its capitalism has brought the migration issue to the center of public debate, both within parliament and among Japanese businesses and civil society. In this context, migration policies have been progressively adjusted to the demands of local capitalism, while also engaging with public opinion, which is shaped by competing liberal ideologies, progressive currents, and varying degrees of nationalism.

Regarding these flows, Ursula Huws asserts that "[…] there are both barriers to and bridges for the free flows of capital investment, goods and services across borders just as there are barriers to and bridges for the free movements of labour" (2012, 2). This statement is insightful for understanding that both barriers and bridges in the movement of people are directly linked to capitalism's central triad: class, gender, and race. The demand for immigrant labor is closely related to the economic context of the receiving country, as well as to the conditions of social reproduction in the country from which migrants depart. It is important to note that by economic context, we refer not only to the economic indicators of the sending and receiving countries but also to the conditions of social reproduction that directly influence the need to attract or expel workers.

In Brazil, as mentioned earlier, around 2 million descendants of Japanese immigrants live in the country, encompassing up to the fifth generation. The history of the relationship between Brazil and Japan began in 1908 with the arrival of approximately 800 Japanese immigrants aboard the ship *Kasato-Maru* at the port of Santos, in the state of São Paulo. Over more than a century, Japanese communities were established in various regions of Brazil, preserving a cultural heritage originating from the *Meiji* period (1868-1912), expressed in specific everyday practices such as dietary habits, bodily postures, and linguistic forms of expression. These elements confer upon the Nikkei the status of bearers of a presumed "cultural code" (Ocada 2006, 148), which, as we will see, became a determining factor in the Japanese government's decision to recruit these workers.

These practices make them socially recognizable and, in certain contexts, perceived as distinct from Brazilians, often being identified simply as Japanese within Brazil. It is within this group that the segment of the *Nikkei* community who emigrates to Japan is situated, composed of individuals belonging to specific fractions of the working class in Brazil, whose trajectories are shaped by subjectivities,

motivations, and choices related to their social origins, among which Japanese ethnicity stands out as a central element.

On the other hand, in Japan, since 1990 the so-called population issue has emerged, in which a myriad of indicators related to social reproduction have created a scenario where the generational replacement necessary for the functioning of capitalism is not occurring. Over the past decade, the number of marriages has decreased by approximately 20%, while the average age at first marriage has increased for both sexes. At the same time, Japan's fertility rate continues to decline, standing at around 1.15 children per woman, despite several governmental attempts to encourage higher birth rates. As a result, the country's total population has been declining for fifteen consecutive years. In 2025, the economically active population represents 63% of the total, a proportion considered insufficient to ensure the proper functioning of the labor market. In the same year, the population aged 65 and over reaches 36 million people, accounting for 29.3% of the entire population (Statistics Bureau of Japan 2025).[4]

Estimates indicate that, in Japan, ensuring generational replacement would require raising the fertility rate to at least 1.8 children per woman – a level that has not yet been achieved. It can therefore be observed that changes in reproductive patterns have occurred independently of the needs of capital, as the current population deficit directly impacts the Japanese economy, highlighting the absence of any natural population law capable of resolving this contradiction. Despite state incentives aimed at increasing fertility, the material conditions and cultural transformations experienced by women have prevented them from contributing to the generational replacement demanded by capital. In other words, gender inequalities have influenced individuals' reproductive choices, significantly altering fertility rates, demographic patterns, and, consequently, affecting the country's economy.

In this context, immigrant labor assumes a central role, and migratory flows become fundamental elements of each country's population dynamics. This demographic issue is not limited to Japan but is also present in much of Europe, particularly in Italy, Germany, and Spain, as well as in Canada and other core economies. This convergence of factors increases international migratory flows and simultaneously expands the relative surplus population on a global scale, which feeds back onto native populations, driving significant transformations in the composition of – and inequalities across – race, ethnicity, gender, and class.

4 https://www.stat.go.jp/english/data/jinsui/2024np/.

Since the 1980s, the demand for immigrant labor had already been present in Japan, particularly in the automotive, electronics, and construction sectors. However, it was only in 1990, through the aforementioned amendment to the Immigration Control and Refugee Recognition Act, that descendants of Japanese nationals up to the third generation were granted authorization to enter the country via residence visas. As analyzed by Ocada (2006), Japanese employers sought to attract a large, participatory, productive, and persevering immigrant workforce. According to the author, the so-called *gambarê ethos* was instrumentalized – understood as a Confucian-derived work ethic that Brazilian *Nikkei*, as descendants of Japanese nationals, were supposedly carriers of. This ethos would confer upon the *dekasegi* a habitus characterized by effort and persistence, traits considered functional and highly demanded in the context of immigrant labor in Japan (Ocada 2006).

It is worth noting that the modification of immigration legislation did not entail a formal opening of Japan's borders to unskilled immigrant workers. Although there was a concrete need to fill these positions, by directing immigration policy toward attracting the *dekasegi* population, Japan incorporated unskilled labor through residence visas without explicitly establishing visa categories for such occupations. In this way, the country ensured the entry of workers considered culturally and phenotypically closer to the native population, while simultaneously avoiding the direct and unregulated admission of unskilled immigrants.

Regarding the working conditions of the *dekasegi*, they are predominantly employed in job niches rejected by Japanese workers, known as the 3 Ks, referring to the first letters of the three adjectives: *kitsui* (hard), *kitanai* (dirty), and *kiken* (dangerous) (Hosokawa 2011, 155). These jobs are concentrated in the automotive industry and companies producing electronic components, all considered flagship sectors of the Japanese economy. In general, *dekasegi* hold flexible employment contracts, often work informally, and have limited social protection.

The integration of *dekasegi* workers into the Japanese labor market is characterized by long working hours, typically six days per week, with daily shifts ranging from 10 to 12 hours, often extended according to production demands. Unlike the majority of Japanese workers employed under stable contracts, hourly wages compel *dekasegi* to work frequent overtime to secure subsistence, with limited opportunities for savings. The precariousness experienced by Brazilian immigrants in Japan extends beyond working conditions, manifesting in various forms of oppression and xenophobia encountered in their daily lives (Roncato 2020).

Although the aspects discussed thus far are fundamental for understanding the migratory phenomenon and the living conditions

of the Brazilian population, the aim of this text requires a deeper exploration of some central questions that have not yet been addressed: What factors explain the emergence of the so-called population issue within a nation? In what ways do gender and race function as structuring categories in the analysis of labor mobility? To pursue this analytical path in the study of migration, it is essential to focus on the dynamics that link social production and reproduction. In this regard, the case of Brazilian migration to Japan serves as a useful example.

4 Migration and Social Reproduction

Contemporary international migrations, often the subject of intense political debate, are frequently interpreted as phenomena with predominantly economic origins. Destination countries – typically core economies – face labor shortages resulting from demographic challenges, or crises of social reproduction, which they seek to address through the importation of immigrant workers. However, from the perspective of Marxist feminist theory,[5] it is essential to problematize the structural causes leading to this situation, investigating the processes that produce labor scarcity and, ultimately, the need to attract immigrants. It is at this point that gender assumes central analytical importance in the migration debate.

In an attempt to develop a materialist response to gender oppression under capitalism, Lise Vogel, one of the pioneers of what is known as Social Reproduction Theory, proposed that investigating the relationship between production and reproduction could reveal fundamental analytical insights. Drawing on Marx, she sought to understand how the labor-power commodity was determined. However, as an analytical path for this inquiry, Ferguson and McNally explain that

> if we follow Marx too quickly here, we run the risk of failing to ask an equally powerful – and, for present purposes, more crucial – question: how is that special commodity itself produced and reproduced? Marx senses that there is an issue, here, but he does not get to the heart of it. Vogel's critical insight involves interrupting Marx's argument at just this point, by asking: what are the *conditions of possibility* of this 'special commodity', labour-power, the very pivot of the capitalist economy? (2013, XXIV)

The "interruption" in Vogel's argument, when applied to the issue of migration, proves relevant as it allows us to question the

5 See, for example, Davis 1981; Vogel 2013; Bhattacharya 2017; Ferguson 2020.

reasons behind low fertility rates, while simultaneously observing population aging and the resulting generational replacement deficit. That is, it becomes important to denaturalize the processes of social reproduction, particularly biological reproduction and its ongoing demographic crisis, and to examine, as Vogel (2013) does, the conditions of possibility and impossibility for generational replacement to occur.

The crisis of social reproduction and low fertility rates are not natural phenomena. Biological reproduction, a socially determined phenomenon, depends on human, social, political, and economic factors that shape it. By social reproduction, it should be understood not as the reproduction of capital in a broad sense, but rather the physical, generational, material, and psychological reproduction of the labor force (Arruzza, Bhattacharya 2020), whether waged or unwaged. In other words, it refers to the reproduction of the working class as a social class.

For biological reproduction to occur, there must be favorable conditions for the production of life, such as an equitable sexual division of labor, wages that allow for a decent standard of living, public childcare, social protection, public policies supporting motherhood, career plans for women after pregnancy, climate security, and other infrastructures. However, the reality experienced by women – beyond the Japanese case – demonstrates a situation contrary to an ideal scenario for social reproduction.

From an analytical perspective on social reproduction and inequalities, there are similarities between the Enlightenment ideal, with its assumption of equality, and perspectives critical of capitalist exploitation, which focus on inequalities strictly in terms of class, thus adopting a stance "indifferent to sexual diversity" (Anderson 1985). In social theory – whether from a liberal perspective or incorporating a Marxist viewpoint – there remain interpretations suggesting that, under capitalism, "classes may still exist, differently related to the means of production, without nuclear families or sexual barriers within them" (Anderson 1985, 104). However, the history of capitalism has demonstrated dynamics that not only incorporate but also produce and amplify gendered and racial inequalities.

In the Brazilian context, considering only wage inequalities, women have historically earned between 20% and 30% less than men, with a 21% gap recorded in 2025 (Brasil 2025). Despite earning less, they work more, as in addition to their paid labor outside the home, women spend 9.6 more hours per week than men on domestic tasks (PNAD 2022). White people, on average, earn 61% more than Black people, demonstrating the persistence and structural nature of racial inequality in the country (Brasil 2023). These inequalities are not limited to Brazil, manifesting similarly in nearly all countries throughout the history of capitalism.

In the Japanese case, inequalities are numerous, with Japanese women earning 22.5% less than their male counterparts (Gender Equality Bureau 2023) and being responsible for almost all domestic work. This historical sexual division of labor – assigning care work exclusively to women – combined with the lack of full-time public childcare for newborns (Roncato 2020), reinforces the necessity for Japanese women to leave the labor market when they become pregnant.

This phenomenon, known as the M-curve, describes a labor trajectory in which women enter the workforce for a few years after completing their education but leave it following the birth of their children, dedicating themselves primarily to unpaid domestic work. Later, this group returns to the labor market, usually between the ages of 40 and 55, when their children's age allows for such reintegration. The M-curve thus represents a pattern characterized by women's entry, exit, and reentry into the workforce, constituting a specific feature of the Japanese context.

However, in recent decades, wage contraction across the Japanese working class, increasing informal employment, rising costs for the material reproduction of life, as well as subjective factors and cultural changes, have led to a significant decline in fertility rates. In other words, those "conditions of possibility" (Ferguson, McNally 2013) are not being fulfilled. How could people be expected to have more children in a context of economic, social, political, and climatic crisis? This set of factors demonstrates that, although capitalist social production plays a decisive role in value creation, it is intimately connected, in a dialectical reciprocity, to social reproduction. That is, the genesis of international migrations has gender as one of its central elements.

In light of the previous reflections, it is understood that contemporary migratory flows assume a central role in the population dynamics of capitalism (Ferguson, McNally 2014, 8), insofar as the current phase of its expansion is structured around the globalization of production and labor circulation. In this process, relative overpopulation is amplified on a global scale, significantly reshaping the determinations of class, gender, and race across different national contexts.

Following Seccombe's line of reasoning,

> If modes of production shape family forms, the obverse is also true. Family forms are active elements in the constitution and development of modes of production, above all because they are central in the production of people and their capacities for work, compliance and resistance. These causal dynamics operate in an intricate and dialectical fashion. (1992, 9)

Social reproduction, understood as a site of struggle, is manifested in women having fewer children in response to the devaluation of

reproductive labor, social isolation, and the shrinking of public resources allocated to this sphere, thereby increasing the demand for immigrant labor.

For receiving countries, immigrant labor largely comes detached from the costs of social reproduction, since the processes of upbringing, education, healthcare, and other necessary investments were carried out in the country of origin (Ferguson, McNally 2014). In the case of *dekasegi* migration, these costs were socially borne in Brazil and later appropriated by Japanese society. Upon entering the local labor market, however, the immigrant population tends to be incorporated under less favorable conditions, characterized by lower wages, limited or nonexistent social protection, and placement in significantly more precarious class fractions compared to native workers (Rocha, Roncato 2023).

When placed in subordinate positions in the labor market, immigrants experience intensified oppression, which not only deepens class inequalities but also amplifies racial and gender disparities in the destination country. Brazilians who emigrated to Japan, while leaving Brazil due to inequalities exacerbated by neoliberalism, simultaneously occupy the most precarious jobs in the Japanese labor market.

In the factories where they work, a structured duality can be observed: on one side, a core of Japanese workers with stable contracts; on the other, a contingent of immigrants in informal positions, whose precariousness is functional to the system, allowing for their replacement or dismissal according to fluctuations in production demand (Roncato 2013). Racial and ethnic discrimination against immigrants takes on particular characteristics due to their foreigner status, legitimizing and restricting their rights and social protection.

5 Closing Remarks

In the analysis of international migrations, they are sometimes interpreted as resulting from individual motivations that lead people to move spatially, while at other times they are conceived as the outcome of economic disruptions in the labor markets of origin and destination countries, understood as the main causes. Both perspectives are not incorrect, but they are incomplete and obscure the primary causes that explain the genesis of contemporary migratory flows.

As demonstrated in this article, the Brazilian labor market exhibits economic inequalities that, especially in the neoliberal context, have resulted in the deterioration of living standards for large segments of the working class, including Japanese descendants in Brazil.

Individual motivations, such as the desire to "improve one's life" (Roncato 2013, 2020), or the search for stability and security absent in Brazil, are part of personal incentives. Nevertheless, these realities do not escape the underlying causes that generate these labor market disruptions in the receiving country, ultimately creating the need to attract immigrants as a solution.

The labor shortage in Japan is fundamentally rooted in the ongoing demographic crisis, resulting from the inability to achieve generational replacement due to low fertility rates. By bringing gender to the center of this issue, one can observe a (conscious or unconscious) reluctance regarding the fact that people of reproductive age are having fewer children. This analysis, through an integrative conception of the production of the labor-power commodity and the reproduction of capital, allows for the articulation of social class, race/ethnicity, and gender in a unified perspective, capable of explaining both the processes of production and reproduction of the working class and the ongoing migratory flows.

Regarding the crisis of social reproduction, Nancy Fraser argues that

> every form of capitalist society harbours a deep-seated social-reproductive 'crisis tendency' or contradiction: on the one hand, social reproduction is a condition of possibility for sustained capital accumulation; on the other, capitalism's orientation to unlimited accumulation tends to destabilize the very processes of social reproduction on which it relies. (2016, 100)

In this context, on the one hand, if one of the responses to this crisis is migration, partially addressing the crisis of capital, such a measure inevitably generates consequences for the social reproduction of immigrants' lives. The contradictory elements associated with immigrant labor are manifold: while it functions in favor of capital, it simultaneously contributes to lowering the cost of local labor, intensifies competition among workers, fragments the social class, legitimizes repressive and population-control policies, and exacerbates inequalities in multiple ways.

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Miscellany

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A Trinity of Power 'Patriarchy/Capital/State' in Gender Inequalities
Intersectionality, Decoloniality, Kurdish Women and Jineolojî

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Abstract Capitalism, state and patriarchy play an important role in gender inequalities; here we focus on the ways in which this 'trinity of power' has been acting as an integrated system from its early stage, according to Abdullah Ôcalan, *Sociology of Freedom* (2020) where he criticizes dominant masculinities, and calls for women's leadership in building direct eco-democracies. The paper tries to connect path-breaking political proposals of the Kurdish Women's Movement about Democratic Confederalism and Jineolojî (Women's Science) with intersectional/decolonial feminisms emerged in last decades; and some Indigenous theoretical/practical perspectives.

Keywords Women's Liberation. Intersectional Decolonial Feminisms. Kurdish Free Women Movement. Democratic Confederalism. Jineolojî (Women's Science). Indigenous theories and practices. Intersectional alliances and social coalitions.

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1 Introduction, Positionality and Purpose

This essay stems from Abdullah Öcalan's analysis of gender inequalities, starting from the roots, which are found in the making of patriarchy, capitalism and the state. We'll look at them as an integrated system: trinity of power.[1] The paper also attempts to contribute in creating a dialectical bridge between the non-Western theoretical and practical experience of the Kurdish movement and decolonial intersectional feminist perspectives emerged in the last decades, both in the 'global north' and in former colonies. I suggest intersectional and decolonial approaches are very close to – yet different from – the innovative perspective of the Kurdish women's movement, and their political proposals.

In the first part of this work, we understand how Öcalan does not procrastinate the liberation of women to some 'post-revolutionary' phase. Several leftist social movements of the past took for granted when justice and equality would be achieved, then gender inequalities could be solved – in this way postponing the solution of women's oppression.[2] Instead, Öcalan brings forward the issue, stating women are at the center of any positive transformation and any politics of radical eco-democracy. The construction of Jineolojî ('women's science') was suggested by the Kurdish leader as a revolutionary way to address the thousands of years old 'women's slavery'. Even though the concept of Jineolojî, in the form of a need, was already circulating among Kurdish women since the 1990s, Öcalan gave impetus to the internal debate on the subject; inspired women's politics and intellectual agency, quality international literature[3] and transformative practices: women have produced their own autonomous structures and knowledges.

The second part of the essay, from the political standpoint of intersectional decolonization of knowledge, presents some of the main concepts in Jineolojî as a new social science proposed by the Kurdish women's movement. Here I have a double aim: the first is to introduce the topic to a broader audience of students, scholars

1 Would like to thank all those who helped in different ways to the production of this essay. I am particularly grateful to Melike Yasar of the Kurdish Women's Foreign Relations Office (Repak) and Kurdish National Congress (Knk).

2 Terminological Notes. I use the word 'woman' to intend Cis- Trans- and socialized women. Terms like 'Native' or 'Indigenous' are considered as synonymous, and refer to different societies such as Aboriginal, First Nation, Maori and Adivasi.

3 In this essay, I quote only published materials, mostly in English, from sources such as books, articles, and websites connected with the Kurdish women's movement and the debate around their political proposals. Far from being all-embracing, my contribution offers a minimal background to understand the argument, and few references for further readings.

and activists; the second, to contribute in answering a theoretical/practical question about what is innovative in Jineolojî, focusing upon which aspects are original, or even ground-breaking, with respect to feminisms.

In the last part I will share some thoughts and intuitions around non-dichotomous viewpoints. There are epistemological elements in Native experiences, theories, methodologies, and social relations, resonating with the Kurdish Women Movement's political strategy of searching for a 'third way', going beyond the limits implied in binary oppositions and western dualities. Looking for alternatives helps in the process of divorcing from the trinity of power, their systems of oppression and the solutions they offer. Furthermore, building a connection with Indigenous theoretical/practical politics (which found expression at an international level during the last five decades) could be useful in view of future intersectional alliances, fostering social coalitions; and in the building of the World Women's Democratic Confederalism, one of the proposals of the movement.[4]

Non-hierarchical, bottom-up solutions emerging from the theory of Democratic Confederalism – proposed by Öcalan in his prison writings – found implementations in the actual experience of Rojava in North and East Syria[5] as well as in refugees-camps. In a global situation marked by ecological and economic crisis, near-bankrupt states, institutional fascism/racism (Basso 2012), and war scenarios, the idea to find solutions may sound like an exaggerated aspiration. Yet, this is what societies (especially women) always did for millennia, interweaving solidarity during difficult times, inventing forms of co-existence and cooperation to face adversities.

Before going further, I would like to unveil my intersectional position in terms of oppressions and privileges; and my posture as a scholar/activist, who looks at the political proposals of the Kurdish Women Movement as pivotal for the contemporary challenges within feminisms and in societies at large. Being an intersectional and decolonial eco-feminist helped me to locate the relations

4 In the economy of this work, the theory and practice of World Women's Democratic Confederalism, as well as other ideas, will not be discussed. The analysis focuses on elements closely related to the aims of the paper. However, this proposal is worth of mention, as an horizon of the international debate.

5 Democratic Confederalism in Rojava was established in 2012, in a critical geopolitical situation, surrounded by authoritarian regimes in Iran and Syria, with Isis terrorists and the Turkish army at times cooperating toward the common goal of eradicating Kurdish people from their own land. Rojava made possible a women's revolution: the Social Contract was approved in 2014 to ensure the self-government of three cantons and the coexistence of different ethnic and religious groups – without re-building forms of monopoly of power and the state. The challenge of raising issues related to patriarchy called international attention toward such an experiment of radical and ecological gender democracy, in a vexed corner of the world, the north and east of Syria.

between women's productive and reproductive work within different environments; and in understanding how hierarchies of class, age, sex/gender/sexuality, race/ethnicity, ability, religion, status, are intertwined in the creation of the patriarchal family and society. As a former factory worker who had the chance to study during the evening, achieve a school degree, and enroll in the University, I feel particularly close to the Kurdish women's effort around community education through Academies open to everybody, and the practice of direct democracy in everyday life.[6] Their work has been a source of great inspiration while teaching in a difficult southern margin of Europe where communication skills, non-authoritarian pedagogy, inventiveness, laboratories and collective activities are at play. As a researcher/traveller, today I enjoy academic status, European citizens' rights and fair skin privileges, due to an enduring system of inequalities striving in a global frame still characterized by the persistence of white supremacy and neoliberal/colonial relations.

The focus on the interconnectedness of different monopolies of power and systems of domination presented in Öcalan's work is very helpful to strengthen the intersectional praxis in research and activism, to avoid making fixed hierarchies among different types of oppression. The various forms of subjugation cannot be fully understood separately: each one is co-constructed in the trinity of power. Each specific oppression related to capital-state-patriarchy can be better recognized in the intersection with others, and fought against in relation to others. Ranking among inequalities (besides being a divisive political practice) is problematic in itself: any pre-determined order of importance may differ according to historical time, geopolitical location, and it is affected by the observer's intersectional standpoint (Corradi 2018).

6 Here I am not going to use interviews carried out in Fall 2019 (in Qamishlo, Rojava; Makhmur Refugees Camp and Erbil, Iraq) which may be reserved for further elaborations. Although brief, I must say the experience of dialogue with women of different organizations in the field helped me to better understand the perspective of inter-ethnic and inter-religious Democratic Confederalism, its strength in theory, empirical methods, and implications in society at large.

2 A 'Trinity of Power' in the Construction of Women's Slavery

> Whereas the woman
> is reduced to a possession
> or a commodity,
> there cannot be any men
> who behaves morally.
> (Abdullah Öcalan, *Beyond State, Power and Violence*, 2022)

Two important premises: in the construction of women's slavery, Öcalan dates back to five thousand years ago the beginning of patriarchy; early forms of city-state; private property and accumulation, made possible by a gradual shift toward sedentariness.

A separate analysis of patriarchy is not possible in light of Öcalan's contribution: three main entities state/patriarchy/capitalism are presented as deeply intertwined from the very beginning: I refer to their articulation as a 'trinity of power', since they constitute an inextricable system of exploitation and oppression. Importantly enough, in the seemingly inseparable dyad 'nation-state', Öcalan targets the state, for having always been against the society, actually *the opposite of society*. But he rescues the concept of nation (as Native place), hoping for a Nation of different nations.[7]

In this paragraph, I am referring mainly to his books: *Beyond State, Power and Violence* (2022); and *The Sociology of Freedom. Manifesto of the Democratic Civilization, Volume 3* (2020). Surprisingly enough, the latter starts by wondering about the reasons why all socialist revolutions of the past failed. The answer is: they avoided to question the existence of the state, and the monopolies of power implied in patriarchy and capitalism. As he argues, no socialist revolution questioned colonial modernity, positivistic science, the ways knowledge is produced, and the state's role in the education of society.

In Öcalan's prison writings, definitions such as 'state society' or 'capitalist society' are presented as misleading, since they hide all the different relations that were outside or against the system. In the same way, expressions such as 'feudal society' or 'slavery society' reflect the dominating point of view. Instead, it would be important to

7 Scholars and activists in the Left are suspicious of the term 'nation' (not be confused with 'nationalism') especially in these times of resurgent fascisms and winds of war. It is important to re-signify the concept of nation as country, articulating proper distinctions from its racist and xenophobic use by far-right groups and nationalist parties. The trinity of power's responsibilities should be separated from those of society by looking at nations as being mostly subjugated to the domain of the states. Past re-significations of the concept include examples such as 'LGBT Nation' or 'Queer Nation' – indicating a common cultural tie among people with different gender orientations and sexualities. Also among the Native-American peoples, 'The Five Nations' refers to a political practice of alliance and co-existence.

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focus on different forms of democratic civilization, as an 'alternative' always survived in all types of human societies, based upon social co-existence, solidarity and democratic innovation. Öcalan (2020) also asserts the preeminence of society over politics, and the primacy of social sciences over all sciences, in a process of transformation so that all sciences could become liberated and oriented towards the needs of society. He criticizes the 'Enlightenment' and *positivistic science* as an ideology legitimizing patriarchy, colonialism and capitalism as a system. As a matter of fact, positivist science was instrumental in 'demonstrating':

a. the superiority of men, with the physical and moral inferiority of women;
b. the superiority of whites, while establishing the lack of status as 'full humans' of the colonized populations – for they could be enslaved with no regrets by the Europeans; and
c. the superiority of capitalism as the highest form of wealth production, more 'rational' than domestic modes of production (centered on life, subsistence and social reproduction, instead of on the supreme value of profit).

Öcalan mentions the Enlightenment also because such an 'age of Reason' allowed "numerous systematic physical and cultural genocides by the nation-state" (Öcalan 2020, 318). He underlines the *weak points* of positivistic science, among which the unrealistic vision of a continuous progress; a never-ending development; which remained undiscussed in real socialism, and through all types of revolutions. As the colonial matrix of power survives the formal end of colonialism (Quijano, Mignolo, Segato, Walsh 2024), the faith in science survives the failure of positivism; Öcalan ironizes around how positivistic science conquered even the heart of utopian socialists: "they are all children of Enlightenment, *with an unlimited trust in Science*" (Öcalan 2020, 136; emphasis added).

Science is an expression of the trinity of power and its capability to function in an integrated way; Öcalan believes we should be more critical of capitalism, patriarchy, and colonialism, pointing out how the challenge to science expressed by feminists in the 70s *did not grow*. In fact, the radical critique of patriarchal, capitalist, and colonial science, first formulated in the West by Sandra Harding (1986), never reached the mainstream; her pioneering work inaugurated a whole field of feminist studies, yet did not translate into a widespread contestation of the *state role in education, health and environment protection* – just to mention some of its most evident fiascos. Another weak point of positivistic science identified by Öcalan is the claim of Western knowledge to be neutral – which does not keep into account two issues: the economic-political-military influences on science, and the intersectional *standpoint* of the observer. The task of assessing the

non-neutrality of science calls for self-reflective practices, starting with the scientists' intersectional positioning in terms of sex/gender, class, race, ability, culture, religion, geopolitical background. The awareness of knowledge being *situated* should make scientists feel responsible when choosing theories and methodologies of research (Smith Tuhiwai 1999), which are usually hierarchical, non-participative, and geared toward the interests of the monopolies of power.

What indigenous people call *white male science* is a main expression of the 'trinity of power' in action: capitalism, state and patriarchy during thousands of years, gradually overthrew matriarchal types of societies; and history moved increasingly toward aggressive forms of masculine dominance. Öcalan refers to this process as an *historical deviation* from what he defined as 'natural societies'. His longer diachronic perspective of 5,000 years helps to better envision the making of patriarchy/capitalism/state as happening with the diffusion of agriculture and increased periods of sedentary life, which made collective accumulation possible.

When cooperation left space to competition, accumulation became 'privatized'; and the control shifted from the women's common domain to the males of each family/clan. The possibility of *producing and accumulating more than others* created inequalities and established the foundation of social classes, with a hierarchy among male owners; subsequently, casts were formed on the basis of the division of labor. Women became private property and were kept in slavery, exploited for their reproductive role, besides their work: the more progenies a man could ensure for himself, the more arms the family could count upon, the more production could be accumulated. He would achieve a higher position in the clan – and eventually his clan would benefit from a greater wealth and power in the competition with others. As Sara Morace (2016; 2012) pointed out, the submission of males to the state ensured them the private property and the submission of their women and children.

City-states such as Uruk from the 4th millennium B.C. became the dominant form of sedentary civilization, with social stratification, division of labor and specialization. In Öcalan's theory, outside the walls still lived 'barbarians': nomadic civilizations remained as antagonistic forms of civil society, keeping matriarchal values, and Goddesses symbolizing a symbiotic relation with nature. The nomads had low division of labor, almost inexistent social stratification and hierarchies. The 'travelling horde' (Cucchiari 2018) could rely on scarce possibilities for accumulation; it had to maintain a respectful relation with the environment; a strong social bond between all members, and the spiritual bond with female divinities representing nature, abundance and cooperation. Öcalan connects the shift toward male Gods – symbols of competition, strength, and male struggle for supremacy – with the loss of women's power, and the beginning of

their enslavement.[8] He insists on natural societies, where solidarity was the fulcrum of life and reproduction more important than production: women's wisdom was governing, ensuring cooperation and adaptation to the laws of nature. Male dominance created ambitious disharmonic societies, driven by greed, fear of scarcity, wars, invasions and enslavement of those belonging to defeated societies. Women in particular were precious spoils of war: the making of a state seems to need a surplus of reproductive force and often implies the kidnapping of women.[9]

Öcalan wonders about overcoming thousands of years of women's slavery, invisibility in history, economy, politics, arts, medicine, and mathematics. Women were considered to be inadequate, ridiculous, and deficient in any field of knowledge; their contribution was denied, appropriated, and misused. For millennia, they were objects of violence, scorn and toxic narratives about their wickedness. At the same time, the trinity of power was celebrating masculinity in all its aberrations: killing 'enemies' in wars; invasions, exterminations; and the 'gynecide' of women who did not want to submit to patriarchy: centuries of witch-hunt to cancel their knowledge, wisdom and even the memory of their resistance.[10]

In *Beyond State, Power and Violence* (2020), Öcalan questions everybody: no one can call themselves out, since the relation between man and woman represents a form of 'hidden slavery'. Therefore, even the poorest husband, with his wife "can behave like a little emperor". The dominant social narrative takes place in everyday life behaviors and it is based upon considering women as inferior; imposing men's point of view and interests; strengthening the patriarchal ideology and legitimizing toxic conducts through silence and complicity. Males believe in their superiority – also when they do not exert any direct forms of violence, they enjoy male privileges. Öcalan, explains how human beings represent "nature becoming aware of itself", asserting women are *closer than men* in that process of understanding, since they are "universal and divine" beings: it can be seen in arts, politics, science, and in revolutions.

8 The city-state produced a functional category of older males as priest and decision-makers, and an army of young men for defense and expansion. Such processes lasted centuries; some societies were not attracted by the growing cities and kept a nomadic life in mountains or forests, at the margins of the new civilization (Öcalan 2020; 2022; Cucchiari 2018).

9 Examples range from the Romans to the Isis: the building of a state seems to always imply violence, torture and massive rape; the dispossession of women's knowledge, and the exploitation of their capacity to generate life.

10 The 'witch hunt' lasted through the age of 'Enlightenment', it still happens in special economic zones (Sez) and areas of 'structural readjustment', where new forms of primitive accumulation are violently taking place against society (Federici 2018).

Between men and women, the 'divine' aspect should be reflected in the relation. Yet, men demonstrate to even "use mortal weapons against their body"; and manipulate women by using "the deceptive rhetoric of love". Öcalan in his work also explains freedom, which also consists in moving from the city to the rural areas, re-establishing a friendly and symbiotic relationship with the non-human part of nature, committing ourselves to overcome existing relations in what he calls a *battle for love*. Clearly, he refers to an affect quite different from the dominant and individualistic feeling based on possession: it is a type of love able to reconnect humans in the struggle for the collective goal to live in the present time (not in an imaginary future) freedom, beauty and 'equality in the difference'. He considers the choice to stop working for the state or for the capital to be practicable and urgent, to build cooperation toward an eco-agrarian, eco-industrial society based on reproduction and wellbeing. With our quotidian activity, we all support the trinity of power and its unsustainable profit-driven productions: a change of goal at the everyday life level is seen as the first step for building a truly democratic society.[11]

By belonging to a state, we all support the system financially and with our work – without any type of popular control over the administration of socially produced wealth – in this way contributing to maintaining a creamy layer of apparatuses and corrupted politicians, which represents a heavy cost on the nation's shoulders. A considerable amount of the country's wealth is drained by bureaucracy and officials involved in 'patron-client relationships' (Putnam 1993). An intricated system of 'favors exchange' functions in the interfaces of capitalism and politics: elected representatives (with their families/friends); administrators, business-man, profiteers, courtiers with hooks for extra-legal services in the backstage. The results are disheartening: salaried workers pay mandatory taxes cuttings from one third to half of their incomes – which should be used for quality schools and hospitals, health promotion and prevention; appropriate environmental protection and maintenance of infrastructures; housing and welfare for the population. In reality, such resources are mostly allocated to support the functioning of the bureaucratic state itself; growing military forces; and a welfare favoring banks and big businesses.

11 Öcalan considers as paradoxical when the societies believe to be the nation-state. Even in the political Left, many believe 'the state is us' while the state should be seen as 'the opposite of society': it does not serve the needs of people but those of capitalism and patriarchy. For this reason, crucial sectors such as health and education cannot be abandoned in the hands of the state: they are seen as a task of the community self-government.

3 Intersectionality, Decoloniality and Jineolojî

> We were told that we had either not read enough on communism
> or, if we had, we had not fully understood it.
> Then the feminists began to express the same idea,
> that as Kurdish women, we had not read enough on feminism
> or, if we had, we had not fully understood that either.
> (Azize Aslan, *Anticapitalist Economy in Rojava*, 2023)

This paragraph aims to bridge intersectional and decolonial approaches in feminism with theoretical and practical aspects of the Kurdish women's movement and the Jineolojî perspective, highlighting their innovative quality. In Öcalan's works, the overcoming of exploitation of man, women and nature is connected to an understanding of patriarchy, capitalism and the state as an integrated system from the beginning; the intersectional approach looks at inequalities relating them with each other and with the structure of society – which has been shaped by such a trinity of power and by the collective practices of those who resisted and found alternatives.

In decolonial intersectional research we analyze *simultaneously* the various interacting aspects of a system functioning as a whole starting from the bottom. It is a patient work of decoding and disassembling different axis of power and oppression by identifying inequalities of gender, class, status, religion, culture, sexuality, age, ability, located in their own geopolitical background. Such intersecting categories should be understood as *mutually constitutive*: this is why a positive transformation cannot succeed by struggling against one aspect of the oppression at the time (Davis 1981; Anzaldúa 1987; Hill Collins 1990).

Such an enterprise implies the decolonization of our concepts and categories, which means looking at how they have been socially and historically constructed in the making of the trinity of power through different economic, social, religious, sexual and political forms.[12] The integrated system of hierarchies and inequalities emerges with clarity; classism, racism, colorism, heterosexism, and ableism, together actively participate in changing forms of colonialism – at different levels: financial, cultural, digital and military – as they work at the same time for the benefit of the trinity of power. A decolonial activity of disengagement from the dominant system of knowledge production could start from *de-linking oneself from institutions* (Mignolo 2007) in parallel to working towards the decolonization of language, relations, concepts, and methodologies (Smith Tuhiwai 1999). As we'll discuss in the third part, decolonization includes the overcoming of binary thinking and dichotomies in our relations, activism, teaching and research.

12 See Lugones 2007; Mohanty 1984; 2003; Vergès 2021.

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A decolonial analysis of the *context* is pivotal for building intersectional alliances and social coalitions based upon cooperation and solidarity. As Öcalan (2020, fn. 16, 382) sustains, democratic forms of civilization always existed, based upon *Asabiyyah* – ancient Sumerian term for social solidarity – without which we would not have survived the last Ice Age. He considers Asabyyah 'engine of history', a fundamental bond for societies everywhere, to be re-discovered by scholars and activists who are committed to social transformation – and by feminists, since social solidarity has been interwoven for millennia by women.[13]

A matristic perspective and practice existed at the dawn of all societies: "there are many elements that come from the matriarchal society but we could not create a link between this evidence and our life". Before the creation of Democratic Confederalism and Jineolojî, "we talked about it in terms of utopia, but then we understood that *it still exists in our life* […] this means that we must have autonomous structures to self-manage our problems and solutions, we cannot wait for someone, a man, the state, to do it for us" (interview to Zilan and Avrin, as quoted in Piccardi, Barca 2022, fn. 10, emphasis added).

In the last decades, a vast array of publications welled up from the Democratic Free Women's Movement (DFWM) in Northern and Eastern Kurdistan, and were translated into several languages among which Turkish, German, English, Spanish and Italian, spreading news and reflections about Jineolojî. It is not in the capacity of this essay to provide a comprehensive account of the rich production of materials – research projects, pamphlets and books. I will introduce just few key concepts, to spur a debate in the feminist arenas about what is innovative in the Jineolojî approach.

A seminal publication of the Democratic Free Women's Movement titled *Jineolojî in the Search of Truth* contains most of the important concepts recalled in the following works. It explains the meaning of Jineolojî, from the word Jin (woman) and the word Jiyan (life), sustaining how women were the first to have self-consciousness, since "life occurs within the body of women". For there are "indestructible bonds between women and life […] women are the ones who build the natural society with moral and political values" (DFWM 2013, 5).

The inspiration of Jineolojî relies on a simple principle found in Öcalan's writings from prison: "Those who cannot think for themselves cannot govern themselves", at the basis of what is announced as a "new paradigm of mind building". In other words a *change of mentality* is necessary, geared towards overcoming dichotomies imposed by the hegemonic system, among which:

13 *Women Weaving Futures* for exchanging ideas, praxis and solidarity, see: `https://womenweavingfuture.org/`.

'subject/man, object/woman; subject/master, object/slave; subject/state, object/society'. The mental instruments through which the trinity of power reproduces itself – from mythology to religion, from art to science – are grounded in these dichotomies. They are crucial in the reproduction of social sexism: "the relation between men and women couldn't be transformed into a property relation without the establishment of a paradigm legitimizing the property over women, *before other private properties*" (DFWM 2013, 3; emphasis added). In other words, the property of women is seen as having produced a 'domino effect' in creating all other forms of private property.

Jineolojî, the science of women, is seen as playing an important role in many topics and fields of knowledge – with a focus on the analysis of slavery, including the mental one in the form of internalized codes and values. Such a de-patriarchal mission starts, quite radically, from relations in everyday life: while not calling themselves 'feminists' (feminism is seen as only one of the forms of resistance, emancipation, and liberation) they give central attention on the *bonds among women within societies* – considered to be decisive for building a 'democratic family' (DFWM 2013, 8; emphasis added).

As noted before, ideas expressed by intersectional and decolonial feminisms have common points with Öcalan political theory; an important relation can also be found between the eco-feminist movement and the approach of Jineolojî, in terms of environmental vision and attention to local struggles. German sociologist/activist Maria Mies, co-mother of eco-feminism (Mies, Shiva 1995), has been tributed for her contribution by the Academy of Jineolojî and Jineolojî Center of Europe (2023). Particularly, the work about women as the last colony (Bennholdt-Thomsen, Mies, Von Werlhof 1988) has been 'completed' in Öcalan's theory around *women as the first and last colony*. In fact, during an epochal passage in human history (from nomadic gatherer-hunter societies to sedentary agricultural city-states) women have been *first* colonized for being producers of that 'very special commodity' that the labor force is – in so determining a different accumulation capacity among the males. While today women represent the *last* colony of capitalism both in the so called developed countries and in the Global South: either unpaid and naturalized in *housewifization* processes (Mies 1986); or underpaid as domestic helpers; forced to long hours in fading away subsistence economies or migrating for 'care jobs' in the cities; industrial or sex workers; kidneys/corneas 'donors' or eggs providers, also renting their uterus in the growing sector of reproductive technologies (Corradi 2021a).

Ecological politics, alongside women's liberation and radical democracy, can be an alternative to the present Earth-shattering crisis. What may be regarded as a concrete example of eco-feminist experience took place since 2016 in a women-only settlement: Jin War eco-village, in the North-east of Syria, an ongoing realization

of Democratic Confederalism (Cioni 2019). In the book *Make Rojava Green Again*, the experience of an ecological society in construction is presented by authors of the Internationalist Commune of Rojava (2018) committed to actively modifying the relationship between humans and nature, theoretically and practically. As Debbie Bookchin clarifies in the 'Preface', only when we will put an end to hierarchical relations among humans (men over women, elderly over youth, a religion or ethnic group over another and so on) will we be able to cure our relation with the natural world (Internationalist Commune of Rojava 2018).

A truly ecological society, oriented towards autonomy, self-governance and the common good, can be achieved putting into discussion all forms of domination, starting with patriarchy. Jineolojî proposes to build 'a feminine mental world' which implies a radical intervention on the dominant male mentality (negatively affecting males, females and others). Nobody is free from such an influence: being patriarchy five thousand years old, as a long lasting social construct, it cannot be dismantled without a collective political action specifically oriented to the goal of overcoming toxic masculinities, anywhere they are found. Disassembling the dominant male mentality is also related to searching 'ways for a counter-production' of new critical narratives, able to overcome present patriarchal sciences in favor of women-centered social sciences, economy, history, architecture, demography, medicine, and law.[14]

A concept by Öcalan, *Kustina Zilan* indicates the necessity to 'kill the dominant male' inside everybody. It was formulated few years before his illegal imprisonment; and denotes a sharp political interest in dismantling patriarchy, as early as in the mid-Nineties. The translation of his writings on the subject inspired ideas and practices also beyond Rojava: some examples are offered in a conspicuous publication titled *Killing and Transforming the Dominant Male* (Andrea Wolf Institute 2021). It contains episodes of male rebellions against patriarchal masculinities, like the case of fishermen in the Basque Country; and a 'theory of eternal divorce' from the power system (Jineolojî Committee 2018, 42). Some case studies are presented – one of which with interviews to male workers in Qamishlo (*de facto* capital-city of the Jazira Canton); and experiences about educating men in Kobane and Cizire. Jineolojî calls for 'woman's freedom, equality and democracy' through actively eliminating the patriarchal/masculine domination structures and culture. Yet some perplexities are raised about the role of the 'family unit' and the role of women as mothers still much emphasized in Rojava. Moreover, the

14 When not otherwise specified, the source of online materials is the European Jineoloji website `https://jineoloji.eu/`.

implication of a 'relationship of identity [that] is forged between the female body and the homeland' has been criticized as inherent to nationalism (Dinc 2020, 53).

The emphasis on education (*Perwerde*) has always been strong in theories and transformative practices produced by Jineolojî: here I want to mention a project having men as protagonists. After the bombing and occupation of Afrin by the Turkish state in 2018, hundreds of thousands of people were displaced from Afrin to Shehba, in an area where Jihadist gangs, including Isis, were active and committing atrocities. The region was liberated by the Syrian Democratic Forces in 2016, establishing an autonomous democratic system. Even though the situation was not idyllic and only a part of the population participated in the experience, it was a serious attempt of self-administration, inter-ethnic and inter-religious co-existence (Jineolojî Committee Europe 2021a) – with women in the leadership, co-chairs system and councils for all areas of life, protecting women's free will and their lives with self-defense. However, because of violence deeply entrenched in society, underage marriage, rape, femicide and women's suicide were still happening.

This is why, "despite the harsh conditions of all the impacts of war, displacement, the economic and military sanctions of the Syrian state, and daily attacks from the Turkish state" the Jineolojî Research Centre and the Kongra Star (Regional Women's Council) of Afrin and Shehba decided to step into a leading role in fighting patriarchy, by assessing how "primary duty is the promotion of education, discussions and actions that develop women's empowerment; collective memory; organization; cooperation and self-defense" (Jineolojî Research Centre of Afrin and Shehba, Kongra Star 2022, 5).

As the Report narrates, around 450 men organized in different working groups participated in an educational initiative of the refugees camp, strongly wanted by the women. They analyzed for days important topics directly related to everyday life: the patriarchal mentality embodied in the family structure; how women are portrayed; how men could see themselves as responsible for the transformation of sexist mentalities and for the eradication of gendered oppression. A new perspective emerged, with practical commitments and plans – which constituted what the Report defined as 'a leap forward', toward solving the problems of women, society and family, with full participation and shared responsibility – in the context of autonomy, for building a Democratic Nation. Among the achievements, authors mention also conceptual tasks: the re-signification of the concept of 'honor'; the condemnation of the property over women and children; the blaming of violence; the promotion of a culture of connecting and sharing; the will for *Hevjiyana Azad* – a 'free life together'; and the necessity of reclaiming love, without a desire for supremacy, a true love for women, society and nature.

Alternative teaching methods were identified with cultural projects and workshops in neighborhoods, communes, and with families; also involving the *Kongra Star* for monthly initiatives to contrast all types of gendered violence (Jineolojî Research Centre of Afrin, Shehba, Kongra Star 2022).

In such initiatives, the instruction and coaching of men is given by women and it is considered one of the important tasks of this revolution in Rojava (Sima 2023). In the meanwhile, women's education proceeds in all spheres of life: direct access to the knowledge of women and actualization of their scientific production will reshape women individuality and sociality, enabling them to find methods for deciphering power-seeking male-dominant structures – and attitudes. It may be useful to paraphrase again "the colonial matrix of power survives colonialism" (Quijano 2024) to explain how the *patriarchal matrix of power survives patriarchy*. In facts, by not addressing male dominant structures and behaviors, women may be able to achieve a formal equality – with women's councils, equal opportunities, and double leadership – while still having severe issues related to patriarchal power in everyday life, relations and politics.

Jineolojî warns about the risks of approaching the problem of gender inequalities from a "narrow legal-political equality standpoint". They also notice how, being "highly fragmented in itself, feminist movements contributed to liberalism" (DFWM 2013, 14). In fact, such a fragmentation and lack of unity had the effect of inducing the women's movements in western countries to the acceptance of *solutions offered by the state, the dominant science, the world of business, and educational institutions* – with the result of politically de-radicalizing parts of feminism (Eisenstein 2009). As posited by the Democratic Free Women's Movement "through history, the solutions offered by the powers who created the problems, result in the same consequences […] strengthening the dominant civilization system" (2013, 6). These words invite to reflect upon feminists' enthusiasm around artificial intelligence and reproductive technologies – without considering their risks for human health (Corradi 2021a). Furthermore, genetic manipulation of plants and animals, (nowadays called Tea, 'Technologies of assisted evolution'), with the invention of potentially dangerous nano-bio technologies, seem to be enhancing state and capital control over bodies, life and the land, while diminishing people's autonomous possibility of subsistence.

The organizations of women intellectuals and movements are pivotal in order to determine priorities and policies in the construction of women's freedom. For centuries, women were defined as "the weakest and less powerful members" – not seen as wise inventors, producers of knowledge and those *commencing the sociality* (Morace 2012; 2016). Knowledge structures are power-oriented not just under capitalism, but also in former 'socialist' countries: both systems were

able to turn social impulses towards change into "fresh blood to nourish the powers". For that matter, Jineolojî "dwells into the source of all these failures" and gains "consciousness and organization to overcome the power structures, so as to develop a renewal in the domain of social sciences" (DFWM 2013, 7). Such a radical transformation implies the possibility of women's self-defence – both materially and symbolically – in autonomous spaces.

The repression of women's political agency, especially by the Turkish state, targeted Kurdish women community leaders, lawyers, journalist, writers, and even Member of Parliament Gültan Kışanak who wrote from jail *The Purple Color of Kurdish Politics* (Kışanak 2022) with other women prisoners. Women through centuries have been considered "as a trouble and kept under severe isolation", used in wars and by the state in different ways, also creating "dominant women models of each era".[15] The collective explanation of women and their abuse is not related just to the emotional/sexual sphere; but also in terms of historical, economic, social and mental exploitation. Women's freedom can be enhanced in relation to democratic civilization and experience, with the comprehension of "alliances with other subjects" (DFWM 2013, 8), which seems to refer to all those who are not included in the gendered binary system.

The knowledge structures of patriarchy, state and capitalism are in a crisis due to multiple issues impacting the trinity of power as a whole: financial and ecological calamities; problems of physical and mental health at a systemic level; increasing violence in the family, and against vulnerable subjects; a profit economy of production/accumulation that leads toward wars for energy resources, raw materials and water. Jineolojî proposes itself as an alternative to existing relations and perspective: by re-writing social sciences, a general renewal and re-thinking of the social body is stimulated. While positivistic science wanted to control nature with the mentality of dominating it as an object, Jineolojî believes in re-establishing a respectful tie and cooperation with nature and among humans – which imply processes of truth, beauty, ethics, aesthetic. Today "the transformation of knowledge into an instrument for power is realized through disengagement with morality" and it is such a disconnection that brought the world to the present unsustainable situation (DFWM 2013, 10).

Jineolojî is not just a 'feminine perspective on science', it challenges institutionalized academic paradigms by unveiling hierarchies; and

15 Middle Eastern women have been used in Orientalist narratives to legitimize foreign intervention in wars. In the case of Kurdish Women's Units for self-defense (YPJ) they happened to be exotified by western media, and "rather than being depicted as they are typically, as passive, silent victims (requiring liberation), YPJ women are instead depicted atypically as agentic (as liberators)" (Gunaydin 2022).

granting value to the knowledge coming from (what bell hooks called) the 'margins', E.g., economically challenged women in rural areas and in the urban working class. This approach is based upon the expertise of women linked to their livelihoods, their bodies, and their environment (Rostampour 2024). As it has been shown, already in the 1990s Kurdish women had a strong perception of how power relations related to gender, culture/ethnicity and class profoundly affect their lives: their existence was and still is "marked by interconnected systems of oppression". The role of Jineolojî "not only strengthens their agency, as they begin to organize autonomously, but also create challenges to some foundational boundaries of the modern state" (Ferreira, Santiago 2018, 495).[16]

The Kurdish scholar Dilar Dirik in *The Revolution of Smiling Women. Stateless Democracy and Power in Rojava* looks at how women are re-weaving societies departing from a crucial standpoint: everyday life – a strategic milieu first proposed in the West by Marxist sociologist Agnes Heller in her famous book *Every Day Life* (Heller 1984).[17] Dirik (2018) analyzes the Kurdish freedom movement from a gendered perspective, departing from women's experience; everyday life relations and politics in the construction of direct democracy; leadership and education; consciousness and freedom in building Rojava's Democratic Confederalism – a social revolution with the unique feature of going beyond state, patriarchy and capitalism *simultaneously*.[18]

Jineolojî is often presented as an 'alternative science paradigm' – a view challenged by feminist scholars Najde Al-Ali and Isabel Käser, who proposed a different interpretation: "we argue that Jineolojî resonates with epistemological principles articulated in feminist standpoint theory and in transnational and decolonial feminism, and as such, it should be recognized as contributing to these approaches" (Al-Ali, Käser 2021, 214-5). Although some original features expressed by Jineolojî in terms of critical epistemology are recognized, authors are oriented toward considering Jineolojî "a continuation of critical feminist interventions to knowledge production rather than a new methodology or new scientific paradigm" (239). The article originated an intense debate and was the object of an 'Open Letter' containing severe criticisms by the Jineolojî Committee of Europe (2021b). This document also exposed flaws in the research, descending from authors having missed interactions, during their stay, precisely with

16 On the role of women in the dissolution of the state see Gunaydin (2021); Dirik 2021.

17 For Kurdish women's narratives and everyday life in the context of Turkey, see Handan Çağlayan 2020, 155-206.

18 On the role of Kurdish women see also: Shahvisi 2018; Ferreira, Santiago 2018; Cioni 2019; Käser 2021; Dirik 2022; Rostampour 2023.

the women involved at the Jineolojî Academy, and Jineolojî Faculty in Rojava University at Qamishlo. In the reply, authors admitted limits and shortcomings in their research. Because of a non-participative methodology in the design, the goal of research was missed – and an accusation of Orientalism raised, even though authors had no intention to be detrimental to the Kurdish women's movement, but were motivated by solidarity (Al-Ali, Käser 2022).

Having no authority nor intention to assess if Jineolojî represents a truly new paradigm or just a great contribution to world's feminisms, (Her/story will tell), I see Jineolojî both as the continuation of a long path walked by feminists of all types (especially intersectional, decolonial, indigenous, queer, Anti-speciseism and eco-feminists) with a deeply transformative non-Western original approach, having strong elements for a 'paradigm shift', as Kuhn would say. I am going to contribute to the debate – without the pretense to be exhaustive – by trying to answer to an ongoing research question: which are the theoretical and practical innovative aspects of Jineolojî, with respect to feminisms?[19]

Jineolojî presents unprecedented aspirations and targets:

1. While in the past feminisms produced critiques of the dominant sciences, and the knowledge imposed by the dominant system, *Jineolojî is willing to become a new scientific paradigm* – by proposing innovative methodologies.
2. Being interested in the creation of a system of free communal life, based upon independent knowledge, *Jineolojî transforms its critique into a constructive project, a practical way of living*.
3. A remarkable goal of Jineolojî is to *overcome separations among feminist epistemologies and perspectives*. It is impossible not to notice how the present fragmentation is divisive, while unity is needed to fight the trinity of power.[20]
4. Another challenging purpose is represented by the practice to *change men and dominant masculinities* in concrete ways (Andrea Wolf Institute of Jineolojî Academy 2021).

These points clearly indicate strong differences with most of the feminist experiences expressed in the West – and call for urgent attention. I believe future advances in the diffusion of Jineolojî also

19 Distinctions with feminism are never presented as divisive in Jineolojî: "It is important to discuss feminism as part of Jineoloji […] [which] will after all be founded on the lineage of feminism […] we call [them] the rebel of the oldest colony […]. Woman is the first oppressed class, nation and sex" and should *organize autonomously*, with other women (DFWM 2013). About the rebellion of the oldest colony, see Guneser 2021.

20 Patriarchy, capitalism, neo-colonialism, and androcentric social sciences still have a strong grip over society; a conflict-ridden feminist arena is not only self-harming, it is a guarantee for defeat.

relate to the possibilities of opening a wider debate with intersectional/decolonial perspectives; indigenous theories, methodologies and social movements.

Jineolojî Studies is ready to become "a part of academic studies [...]; establishing academic cadres [is] important for both Jineolojî and the Free Women's Movement". The issues of *slavery interiorized by women* is central today, and needs a double edge intervention: against the reality of "women aspiring to have power" who pursue individualistic goals to promote themselves; and against the reality of "weak, feeble minded, vulnerable women" (DFWM 2013, 14-15).

At the end of this section, would like to mention some of the unwritten regulations emerging in the 'common life together' among women in Rojava and beyond: an extraordinary code of conduct which may add practical inspiration to the theoretical reflections. The emphasis on ethical/political behaviors finds articulations in the rule of never criticizing a woman in front of men; nor expressing disapproval at her back; while offering appreciations as well as compassionate and caring critiques in specific settings called *tekmil*.[21] Such self-determined collective practices and other social tools are meant to improve co-existence, and may be very helpful in changing attitudes, de-patriarchalize conducts and manners – also within the feminist arenas, and in social movements at large.

4 Native Non-Dichotomy and a '*Third Way*' in the Politics of Alliances

For the embattled
there is no place
that cannot be home
nor is.
(Audre Lorde, *The Black Unicorn*, 1978)

In this last part I am sharing intuitions about Native non-dichotomous approaches, reverberating with the search for a 'third way' expressed by the Kurdish women movement. Many Indigenous peoples do not identify themselves with the state – given the genocidal practices they were confronted with, during and after colonialism. Their political postures resonates with Öcalan's theory about the necessity of a conceptual separation between Nation – as the native land or 'birth place' – and the State as part of the trinity of power. Indigenous technologies of survival, based upon consensus politics, were established and developed mostly maintaining a *non-dual approach* in the creation of new knowledge while preserving the old one, to

21 On *tekmil*, 'criticism and self-criticism' see Guneser 2021, 117.

serve the communal life. This is a feature I feel as being in tune with the Kurdish experience.

In some Native contexts efforts are made to re-affirm the value of ancient knowledge, traditional medicine, ways to produce food and save water. The idea to rescue a political (non-essentialist) 'maternal principle' is differently defined in various types of indigenous and communitarian feminisms. E.g., in Aymara-Quechua language, *Pachakuti* indicates a transformation, currently going on in the hierarchical order, and it implies words: female is mentioned before male – and not the opposite, as it used to be. While *Warmikuti* salutes "Women coming back to the community" (Montilla Oliva 2025). This is very similar to what Öcalan recalls in the term *Amarji* – ancient Sumer word meaning 'going back to the Mother'.

In indigenous knowledge, separations and dichotomies seem to be a starting points for hierarchies and inequalities (Connell, Corradi 2014; Corradi 2016; 2019). When patriarchy prevailed, myths of origins were revised: Goddesses of prosperity became subaltern to Gods of war; a hierarchical order took place between male and female, owner and non-owner, rich and poor, sedentary and nomads, civilized and 'barbarians'. The intertwined interests of patriarchy and accumulation, in the making of city-states, gave origin to a ranking type of organization in terms of power, status, and wealth (Öcalan 2020). A social ladder based on possessions and abilities was instrumental for the functioning of the new structure; and eventually it became undisputable: God's Will. The division of labor created separate functions for religious/political leaders (older males); different ranks within the growing army (young males); artisans/peasants, a low cast of servants; and the slaves. Öcalan underlines how in ancient history the Circle[22] represented in the *Aşiret* (a horizontal social structure) is replaced by the *Ziqqurat* – a hierarchical configuration having vertical features: the Pyramid (Öcalan 2020; 2022).

A binary way of looking at the world became an important feature in the dominant civilization: western dichotomous thinking was born on clear-cut divisions between white and black, right and wrong, true and false; creating hierarchical separations between humans, animals and 'Nature'; between intellectual and manual work; reason and affect; whereas the second elements is always found in a subaltern position. The same can be said for the dichotomy between mind and body; which keeps spirituality as a third unseen aspect, or colonized by a cast of clergy. Duality proved to be a rationally functional approach for the trinity of power; yet limited for not

22 The Circle as a social form of gathering is still existing in Native and Aboriginal contexts, where members of the community share deliberating processes.

keeping into account inextricable social dynamics, processes and elements of change in deep relations with each other.

Dismantling dichotomous thinking is important also in political terms: the method of 'searching for a third way' to overcome polarizations relates to the needs of contemporary societies. Last century was characterized by the existence of 'two blocs' – western capitalism and so called real socialism (or 'state capitalism'); today we can witness a different situation. With increasing instability and war scenarios, the proposals of Democratic Confederalism and Jineolojî constitute an experiment, *a third way* in the direction of overcoming armed conflicts, implementing inter-ethnic and inter-religious co-existence; radical eco-democracy, and free women's political agency.[23]

Kurdish enthusiasm in developing a third position also means the search for a *third way of life* – neither enslaved by capital nor by the state: social life can be self-governed, according to shared principles. Such a posture is not new: Indigenous peoples, who have been surviving western 'civilization' for centuries, know the practices of internal democracy, direct democracy, conflict resolution and collective evaluation about outcomes and obstacles. They have been looking for political *medians and minimum common denominators* to advance the common good, finding consensus at each step in the decision making processes. (Corradi 1997; 2021a).

Democratic Confederalism implies this (new for some, forgotten for others) change of mentality, to promote practices liberated from the influence of positivism and from the attitude of dominating or being dominated. It should be taken for granted that everybody today is still entrenched with various forms of toxic masculinity, heterosexism, ableism, orientalism, and desire of possession: it couldn't be otherwise. The task of deconstructing patriarchy and 'prevailing attitudes', is part of the larger collective undertaking of *disassembling the colonial matrix of power within each person*.

Such a process is framed in Öcalan's idea of a 'radical divorce' from all forms of power: it implies collectively wondering about which system to build and how to proceed; which democratic principles and structure to put into place; how to promote sociability and cooperation in communal households and lands;[24] which relation to have with the authoritarian state – and also with internal domineering attitudes. Being able to filter and discriminate what comes from the 'trinity

23 In a context of spreading wars, where oppressed people are on both sides, a *third way* cannot be expected by political parties, a state or a consortium of states; it is the product of free societies, based on inter-communality (Corradi 2021b) and representing the possibility of co-existence and cooperation among different peoples, ideas, religions, and cultures.

24 On Solidarity Economy see: https://www.solidarityeconomy.coop/.

of power' and what comes from society (but it is appropriated by patriarchy, state and capitalism) implies the capacity to collectively decode and understand realities, in a respectful and supportive setting.

Often a facilitator role in communication becomes crucial in order to face internal conflicts with loving attitude; to identify *minimum common denominators* and *feminist median lines* for the construction of social coalitions and alliances (Corradi 2018). It also helps the creation of a climate of reciprocal trust and ego-less participation; while cleaning the environment from what Jo Freeman called *hidden hierarchies*, and toxic behaviors. In the trinity of power, systems of oppression are at work also among those who oppose them: let's think about the strength of stereotypes, in manufacturing of consent and consumerism through the ideological power of advertisements. Any society loses its freedom, when artificial 'needs' are imposed upon people and perceived as authentical; when all causes of addiction are glamourized and culturally pushed, confiscating the brain of younger generations. In different degrees, all are exposed to falsifications and manipulated into seeing the *status quo* persuasively represented as the only reality to live, unchangeable yet fun as in a game.

5 Conclusive Notes

In this work I have discussed only some of the ideas and transformative practices of the Kurdish women's movement, indicating commonalities and differences between them and decolonial, intersectional approaches in feminism – focusing on elements for a 'shift of paradigm'. Also have introduced suggestions (not yet fully developed) between the theory/praxis of Jineolojî and those found in Indigenous societies still grounded on caring for nature, other animals and human co-existence, in equality with the respect of differences.

Objections sometimes are raised, during seminars and debates, about Jineolojî being inspired by Abdullah Öcalan – a man. Surely I believe today it is important to claim women-only intellectual genealogies: our contribution in the past was often erased, ridiculed and then appropriated. The pillorying and professional humiliation of women scientists by males is an ongoing phenomenon. Patriarchy still has a strong grip in strategic sites of knowledge production, like the University, also because of competition and self-hatred among women: these forms of internalized oppression, represent strong obstacles in creating alliances and recognizing women-only genealogies.

Other several women's movements in the past, not only the Kurdish, had men as inspirators of liberation ideologies and practices: materialist feminism is ultimately grounded on Marx's analysis and anarcha-feminism on early production by libertarians. The same can

be said for eco-feminism, born in the early anti-militarist, no-nuke, environmentalist and animalist movements. Also Islamic feminism, Hindu feminism, Indigenous and Dalit feminisms have early roots among internal opponents of the system and social innovators, which were mostly men. Several women freedom fighters grew also thanks to radical practices of thinkers and activists who struggled against capital exploitation; the plunder of nature; the state's religious or linguistic oppression; castism and clergy power. In the case of Öcalan, he is an inspiring figure in the Kurdish women's liberation movement also because of his coherence and self-criticizing attitude: his work demonstrates the importance of matriarchal civilizations, Goddesses religions, and early forms of direct democracies based upon social solidarity and women's wisdom.

In this work I mentioned how certain political ideas and practices proposed by Kurdish Freedom Movement are found in different forms among Native, Aboriginal, Maori, Maya, Adivasi societies; and in several declinations of Indigenous and Communitarian feminisms. Especially in the critique of the 'white male science' there are common standpoints: an epistemological change is perceived as necessary to re-evaluate the relation between humans and the non-human part of nature; a focus on 'living democracy' (*Jaiv Panchayat* in Sanskrit); matricentric civilizations of the past and present; a serene acceptance of non-binary bodies and identities; women's wisdom and leadership; new and traditional devices in conflict prevention and resolution within/among communities; the importance of natural medicines – and intuition as an ingredient of knowledge (Corradi 2019).

In conclusion, would like to encourage further research and debates about the proposals of the Kurdish liberation movement, in particular regarding the World Women's Democratic Confederalism and Jineolojî (Kurdish Women's Movement 2023); and comparative studies between their theoretical/practical experience and those of Native and Aboriginal peoples.[25] Collective explorations may start by looking closely at *minimum common denominators* and indicators of radical democracy emerging from everyday life; women's leadership and relations; inter-ethnic, inter-religious, inter-cultural forms of co-existence and self government; autonomous productions of knowledge, cooperative economy, and socio-ecological transformations. All these elements are crucial in alliances-building and in the definition of common strategies to decolonize knowledge, de-patriarchalize societies, and liberate life.

25 For a comparison between Democratic Confederalism and the Zapatista, see Gambetti 2009, and Rebrii 2021.

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Bauman e le disuguaglianze

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Abstract In today's society, ruled by phenomena such as consumerism, consumption, commodification, individualization, and adiaphorization, people are more than ever subjected to social injustice and indifference. This article dwells on Zygmunt Bauman's take on social inequality and its consequences on people. It begins by analysing his early view, centred on the ideas of 'class' and 'class conflict', in order to better understand his later production. Having shed light on the social consequences of liquid modernity, the focus will then shift on the moral implications arising from Bauman's perspective of the contemporary way of life.

Keywords Social inequality. Consumerism. Indifference. Liquid Modernity. Oppression.

Sommario 1 Introduzione. – 2 La centralità del concetto di classe. – 3 La liquidità della disuguaglianza. – 4 Lo smantellamento delle false credenze e alcune implicazioni etico-morali. – 5 Conclusione.

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1 Introduzione

La presenza costante del tema della disuguaglianza all'interno della costellazione intellettuale di Zygmunt Bauman è dovuta in parte al riconoscimento della connaturalità e dell'inevitabilità della disuguaglianza rispetto all'essenza dell'umano con-Esserci e in parte alla sua esperienza di vita. Nonostante egli avesse più volte sostenuto che la sua fosse stata un'esistenza normale, condivisa da molti altri e che, in ogni caso, essa non avesse avuto particolari influenze sulla sua *Weltanschauung*, sulla sua visione del mondo, è difficile credere che ciò sia vero (Wagner 2020; Smith 2000, 3; Blackshaw 2005, 13). Certamente la sua giovinezza, costellata di discriminazioni e di spostamenti obbligati in quanto ebreo nel contesto europeo di inizio Novecento, è stata comune a un'intera generazione, ma lo stesso non si può dire delle fasi successive della sua vita. Non tutti hanno scalato i ranghi dell'esercito e dei servizi segreti della propria nazione; non tutti hanno fatto carriera all'interno dell'ambiente accademico per poi diventare *personae non gratae* agli occhi del regime; non tutti sono stati costretti all'esilio dalla propria patria e non tutti hanno avuto modo di stabilirsi in un territorio fertile dal punto di vista intellettuale. Di più, non tutti hanno saputo – o potuto – indirizzare il proprio duplice sguardo di *insider* e *outsider* verso le problematiche sociali del tempo, prima tra tutte quella della disuguaglianza, e dedicare la propria esistenza all'analisi sociale e alla divulgazione sociologica.

2 La centralità del concetto di classe

La prospettiva baumaniana è, nei primi anni della sua produzione intellettuale, fortemente debitrice dell'impronta marxista e comunista dei suoi studi giovanili e *Lineamenti di una sociologia marxista*, pubblicato nel 1968, è probabilmente il testo che più esemplifica questa tendenza. Non è un caso che parta dall'assunto secondo il quale è l'esistenza socio-materiale, che consta di rapporti interpersonali, a determinare in modo eminente la coscienza degli uomini e le ragioni delle loro azioni. Secondo siffatta impostazione, l'impegno sociale, tipico della sociologia marxista, assume i caratteri di una trasformazione rivoluzionaria dei rapporti sociali (Bauman 2017, 497-9). In questo senso,

> L'influenza marxista sulla sua concezione della sociologia si esprimeva soprattutto nel forte accento posto sul piano assiologico del marxismo, nell'insistenza sul ruolo della teoria sociologica nell'incentivare l'agire mirato a liberare l'uomo dai rapporti sociali ingiusti. (Wiatr 2020, 328)

Infatti, per il Bauman dei *Lineamenti*, il modo di vita umano è precipuamente intersoggettivo, in quanto sistema di accoppiamenti interpersonali che si estrinseca nel versante collaborativo all'interno del processo di produzione. Tali accoppiamenti, poi, vanno a formare la struttura della società, la quale, dal momento che il comportamento di una persona non è mai indifferente alla soddisfazione dei bisogni di un'altra, lega gli individui in rapporti di dipendenza (Bauman 2017, 18-22). Tale dipendenza reciproca scaturisce dalla cronica limitatezza dei beni che, per di più, finisce per essere fonte di un «conflitto reciproco permanente», ossia del «conflitto di struttura»:

> [I] rapporti reciproci […] sono tali che, quanto più è piena la soddisfazione dei bisogni di un gruppo, tanto più ne soffrono i bisogni dell'altro; cioè […] un insieme soddisfa sistematicamente i suoi bisogni a spese di quelli dell'altro. (35)

La relazione che più di tutte determina il conflitto di struttura è, insomma, il rapporto di proprietà dei mezzi di produzione. Di conseguenza, il superamento di siffatta opposizione sembra realizzabile solo per il tramite di una trasformazione radicale della struttura sociale, derivante dall'eliminazione del rapporto di proprietà:

> Proprietari dei mezzi di produzione e uomini che ne sono privi: ecco i due gruppi tra cui esiste il conflitto di struttura. Tale conflitto dura e durerà finché non muta una determinata struttura sociale, fin quando, cioè, i rapporti fra gli uomini esisteranno come rapporti di proprietà. (36)

Si delinea così una «società di contrasto», caratterizzata da una differenziazione di interessi tale per cui una stessa situazione risulta essere vantaggiosa per una parte e svantaggiosa per l'altra. Tale stato di cose viene poi reificato dalla struttura di classe della società, che istituzionalizza i rapporti di comando e di sottomissione, assicurando a priori l'accesso ai beni sociali solo a una delle compagini sociali; il principio di potere emerge proprio dalla necessità di imporre e formalizzare la disuguaglianza sociale. Vediamo più nel dettaglio cosa si intende con ciò. Essendo il potere strettamente legato al conflitto relativo alla divisione dei beni sociali, ed essendo questi costitutivamente limitati, esso è considerabile fenomeno sociale universale, dal momento che per la sopravvivenza della collettività risulta indispensabile l'imposizione del principio di divisione, o meglio, «la sottomissione delle parti a certe regole di distribuzione» (64). Di più, il principio di divisione produce nella quasi totalità dei casi una partecipazione disuguale alla distribuzione dei beni. Così, in seguito all'esigenza di placare le proteste della

parte che ne esce svantaggiata, si origina il bisogno di potere, ossia dell'istituzionalizzazione del modo decisionale circa la divisione dei beni e della protezione del dominio di una delle parti. Si può parlare, quindi, di potere politico di classe, inteso come «l'uso del potere per assicurare durevolmente gli interessi economici della classe dominante» (195).

Se consideriamo la disuguaglianza sociale come la produzione e la distribuzione ineguale delle risorse – materiali e simboliche – e il potere politico come ente della distribuzione di «beni materiali e immateriali» (73), si può riconoscere in esso uno strumento atto ad assicurare la stabilità del sistema sociale e, in ultima istanza, a reificare la disuguaglianza. Si tratta, invero, di istituire un rapporto di sottomissione durevole ed è proprio a tal fine che nasce lo Stato, inteso come organo del potere politico della classe economica dominante (117); di più, potremmo quasi definirlo l'organo della disuguaglianza, in quanto si erge a difensore della proprietà privata, «legata inevitabilmente con il privilegio di una classe nella distribuzione del prodotto sociale e con l'asservimento e lo sfruttamento dell'altra classe» (196). Per svolgere la sua funzione, il potere si serve dell'ideologia ed è così che la stratificazione di prestigio è diretta conseguenza della diffusione di una determinata concezione del mondo.[1] A tal fine, ci si serve inevitabilmente di un pensiero che tenda all'universale, e così

> [I]l dominio durevole di una classe conduce a diffondere in tutta la società un sistema di valori che di fatto consolida questo potere: un sistema di valori che permette di giudicare positivamente i tratti che caratterizzano i membri della classe dominante […] e negativamente […] i tratti più spesso riscontrati tra i membri della classe soggetta al potere. (279)

Il sistema di stratificazione, insomma, classifica in ordine verticale gli attori sociali in base al possesso o meno dei valori giudicati positivamente e al conseguente prestigio attribuitogli; è, cioè, il risultato della riflessione della struttura di classe nella coscienza sociale, favorita dall'interiorizzazione del sistema valoriale della classe dominante. In tal modo, sistema di stratificazione e struttura di classe si co-determinano secondo un circolo vizioso che fornisce una «giustificazione socialmente approvata della disuguaglianza nella divisione dei privilegi e dei beni sociali» (284).

1 Tra gli altri, anche Simone de Beauvoir sottolinea l'esigenza, da parte dei privilegiati, di «giustificare da un punto di vista universale i propri vantaggi particolari» (de Beauvoir 2020, 7).

Se, come si diceva poc'anzi, la proprietà privata è strettamente connessa alla disuguaglianza, essa

> È anche premessa per la diversificazione delle posizioni sociali, cioè dei diritti e degli obblighi che spettano ai differenti membri della società. L'uguaglianza […] cede il posto alla differenziazione dei diritti […] attribuendo solo ad alcuni il possesso di determinati diritti civili e politici. (119-20)

Quindi, potrebbe il socialismo essere considerato un'utopia dell'uguaglianza? Nella prospettiva baumaniana, esso costituisce la fine del capitalismo, ordinamento sociale in cui la classe che possiede i mezzi di produzione si appropria del plusprodotto della «classe-che-vive-di-lavoro», per riprendere la formula di Ricardo Antunes (Antunes 2006). Nella formazione sociale socialista, invece, i mezzi di produzione fondamentali appartengono alla società intera e il plusprodotto realizzato per loro tramite è proprietà della totalità sociale. Lo Stato cessa così di essere una forza atta a opprimere una determinata classe, in quanto si propone di curare la soddisfazione dei bisogni di tutti, e diventa così una sorta di «mezzo-Stato» (Bauman 2017, 237). Questa concezione baumaniana rievoca quella fase transitoria, descritta nel secondo capitolo del *Manifesto del Partito Comunista*, in cui il proletariato – attraverso interventi dispotici – si eleva a classe dominante, utilizzando il potere per accentrare i mezzi di produzione e per pianificare la soddisfazione collettiva dei bisogni. Di più, per Marx, esso,

> [F]acendosi classe dominante attraverso una rivoluzione, ed abolendo con la forza […] gli antichi rapporti di produzione, abolisce […] le condizioni di esistenza dell'antagonismo di classe, cioè abolisce le condizioni d'esistenza delle classi in genere, e così anche il suo proprio dominio in quanto classe. (Marx, Engels 2014, 32)

È, quindi, importante evidenziare che, nel pensiero marxiano, la società che si può definire come comunista nel senso più pieno è quella in cui scompaiono del tutto le classi, caratterizzata da «un'associazione in cui il libero sviluppo di ciascuno è condizione del libero sviluppo di tutti» (32) che va a sostituire lo Stato.

Ad ogni modo, secondo Bauman, per il quale questa distinzione è però più labile, nella formazione sociale di impostazione socialista non si eliminano i conflitti *tout court*, momentanei in quanto relativi alla divisione di beni determinati; ciò che viene a mancare è piuttosto il conflitto strutturale durevole, ed è così che la formazione socialista sopprime la divisione tra le classi (Bauman 2017, 176). Con ciò non si intende la scomparsa totale dei privilegi di

alcuni individui o gruppi – aspetto ineliminabile delle costellazioni umane, inevitabilmente presente anche in quelle socialiste, giacché costituente un carattere idiosincratico della naturale tendenza umana al possesso. Tuttavia, in questa formazione si può frapporre a tale tendenza un'attività cosciente e organizzata che sia davvero efficace, in quanto «il problema dell'uguaglianza […] è un principio fondamentale dell'idea socialista» (177). Si tratta, dunque, di realizzare in Terra il principio di uguaglianza, intesa sia come uguaglianza di fatto sia come uguaglianza delle opportunità.

Insomma, si è visto come all'altezza dei *Lineamenti di una sociologia marxista* la disuguaglianza sociale, ri-prodotta dal potere politico, sia strettamente legata all'appartenenza di classe. Ebbene, tale prospettiva viene scalzata nel corso degli anni Ottanta, quando l'intellettuale polacco si distacca ufficialmente dal concetto di classe quale categoria fondamentale dell'analisi sociale. L'opera che inaugura in modo definitivo questa nuova fase è *Memorie di classe* che, per utilizzare le parole dello stesso Bauman, costituisce il suo addio alla lettura della storia nei termini di lotta di classe (Bauman in Bielefeld 2002, 116):

> *Memories of Class* […] was […] a farewell, not to the working class, but to the identity between the working class and the problem of injustice, and inequality. The problem of inequality survived. But it is not related to the working-class problem especially. Rather, it is reincarnated in the Hellenic vision of post modernity. (Bauman 1992, 206)

Quello che si propone di fare, sostiene Keith Tester, è ampliare la portata euristica dell'idea di alienazione per renderla un attributo non più esclusivo della classe lavoratrice, ma proprio della condizione umana tutta (Tester 2004, 25). Un siffatto cambio di prospettiva si deve innanzitutto alla nuova preminenza della categoria di consumo rispetto a quella di produzione. Inoltre, la classe lavoratrice non è più l'emblema della sofferenza giacché essa è stata decimata sia a livello qualitativo sia a livello quantitativo. Per non parlare dell'allargamento della povertà, non più ascrivibile a una sola compagine sociale (108). Questo aspetto costituisce uno snodo cruciale nelle letture critiche di Bauman, poiché «non riconosce il valore politico del concetto di classe» (Pirrone 2020, 27) all'interno del contesto del capitalismo contemporaneo, in quanto esso costituirebbe solo un residuo della memoria storica, un retaggio mistificante nei confronti dell'analisi sociale. Ciò si deve, secondo Marco Antonio Pirrone, alla sua teoria dell'individualizzazione, per cui «la classe sociale è, per dirla con Beck, una 'categoria zombie', totalmente inadeguata alla descrizione delle strutture della disuguaglianz» (Bernardi 2009, 195). Tuttavia, a mio avviso, il punto è che, per Bauman – un Bauman che, soprattutto

nella fase liquida del suo pensiero, si distacca dall'analisi dei dati per entrare in un reame metaforico[2] –, non ha più senso analizzare le questioni sociali nei termini di classe perché la classe non esiste più, tant'è che abbandonerà l'uso di tale termine, limitandosi semmai a quello di 'sottoclasse', come mostrerò nelle sezioni successive di questo contributo.

La categoria di produzione viene quindi scalzata da quella di consumo: la scena liquida è calcata dall'*homo consumens*, per il quale, più che l'agire di lavoro, è centrale l'agire di consumo (Magatti 2021, 10). I beni di consumo vengono così presentati come necessari, come mezzo per evitare l'umiliazione, per costruire l'identità personale e per esibire il proprio successo; l'unico modo per acquisire e mantenere il proprio status è proprio l'acquisizione di ricchezza e la sua ostentazione. Insomma, si assiste, al passaggio – per utilizzare la terminologia di *Lavoro, consumismo e nuove povertà* – dalla «società dei produttori» alla «società dei consumatori» (Bauman 2004, 44), in cui essere poveri, diversamente da un passato in cui la povertà era strettamente connessa alla disoccupazione, «significa essere dei consumatori mancati o dimezzati» (62) o «inadeguati» (65). In tal senso, l'argomento su cui poggia l'ideologia capitalista consiste non tanto nella promessa della ricchezza, quanto nell'esortazione a diventare più ricchi dei propri vicini (Bauman 2020a, 259). Chiaramente, ciò non è possibile per tutti ed è qui che si estrinseca l'aspetto intrinsecamente anti-egualitario di tale narrazione. Perciò, conseguentemente all'impossibilità di rispondere ai livelli di partecipazione richiesti dalla società, i gruppi colpiti dalla povertà sono i più atomizzati e i più deboli a livello economico, sociale e politico e vanno a costituire i settori più colpiti dalle disuguaglianze e maggiormente sfavoriti della vita sociale. Se, lo ricordiamo, «le più acute ineguaglianze e privazioni delle attuali società […] non possono essere adeguatamente interpretate come manifestazioni dello sfruttamento di classe» (273), il fenomeno del pauperismo viene allora presentato da Bauman come relativo alle aree depresse della vita sociale, raggruppamenti situazionali differenti, che non costituiscono compagini sociali fisse, in quanto viene delineandosi piuttosto una struttura di disuguaglianza orizzontale, cioè relativa alle aree vitali (102). Si tratta sostanzialmente di una privazione mediata: «[l]a pauperizzazione di gruppi o categorie è un effetto secondario della pauperizzazione di aree specifiche della vita pubblica» (265). Ulteriore conseguenza di ciò è l'abbandono di tali

2 Come esplicitato da Will Atkinson, «Bauman's view on class in liquid modernity have never been set out in a systematic way in a few key texts, but are instead spread fairly thinly trough a range of works, often only between the lines of his central theses» (Atkinson 2008, 3).

collettività al proprio destino, derivante dalla mancanza strutturale di istituzioni preposte alla difesa dei loro interessi e bisogni. Se a ciò si aggiunge l'effetto cumulativo della privazione e della disoccupazione permanente, affiora in superficie uno strato di persone e famiglie «disoccupate e gradualmente non occupabili in fondo alla società» (267).

All'analisi sociale presentata in questo testo Bauman aggiunge alcuni dettagli di particolare rilevanza ermeneutica in un intervento del 1987 pubblicato in occasione di una recensione di *Memorie di classe* e contenuto nell'edizione italiana dell'opera, in cui mette in luce il paradosso per cui si assiste al contempo a un incremento vertiginoso del grado di disuguaglianza, intra- e inter-statale, e a una diminuzione del grado di opposizione a questa tendenza. La ri-produzione della disuguaglianza si serve in tal senso di due tecniche: la dialettica della seduzione e il processo di brutalizzazione. La seduzione viene esercitata dal mercato dei consumi e crea bisogni *ad hoc* in modo tale che la loro soddisfazione debba passare necessariamente per l'acquisizione di un prodotto. Di più, descrive l'identità personale e l'immagine del sé come obiettivi raggiungibili esclusivamente tramite l'ostentazione di simboli distintivi offerti dal mercato. Chi è privo delle risorse necessarie per partecipare al gioco del consumo viene considerato consumatore dimezzato, qualcuno «a cui non si può attribuire una capacità di comportamento razionale ([…] nel senso consumistico del termine)» (282). Non solo, questa tecnica si serve anche della brutalizzazione dei poveri e dei deprivati, al fine di impedire qualsivoglia mobilitazione da parte degli oppressi contro l'oppressione stessa. Anzi, i consumatori dimezzati vengono aizzati contro loro stessi:

> I benestanti e chi vive nella sicurezza osservano i poveri e gli oppressi […] con […] soddisfazione; la scena conferma il loro senso di superiorità, oltre a rendere quella superiorità stessa, sicura. […] L'ineguaglianza che brutalizza le sue vittime non conduce al cambiamento sociale. Essa alimenta da una parte l'impotenza e la disperazione, dall'altra la presunzione dell'autogiustificazione. (283-4)

3 La liquidità della disuguaglianza

Il consumismo assume rilievo ancora più centrale nelle opere della maturità, in particolare in *Consumo, dunque sono*. In questo testo, pubblicato nel 2007, Bauman descrive la società dei consumi come

la formazione sociale tipica della modernità liquida,[3] in quanto caratterizzata da relazioni intersoggettive ridefinite «a somiglianza delle relazioni tra i consumatori e gli oggetti di consumo» (Bauman 2010, 15). Ciò che si verifica è una dannosa, ma inevitabile, mercificazione delle persone in quanto il soggetto, per essere tale, deve farsi merce (72-3 e 78-9):

> La 'soggettività' del 'soggetto' […] è imperniata su uno sforzo senza fine del soggetto stesso per essere e restare una merce vendibile. La caratteristica più spiccata della società dei consumi […] è la *trasformazione dei consumatori in merce*. (17)

Il meccanismo per cui la soggettività si delinea attraverso le scelte d'acquisto deriva dal bisogno di riconoscimento, in un modo tale che la soggettività stessa risulta essere un fatticcio, un prodotto umano ipostatizzato e presentato come realtà trascendente, costituita *ab aeterno*.[4] Ad ogni modo, la mercificazione dell'esistenza fa sì che la dialettica soggetto-oggetto si traduca nel dualismo consumatore-merce, sicché le relazioni interpersonali sono imperniate sulla logica dello scarto: la merce – umana e cosale – inadeguata, imperfetta o insoddisfacente è destinata alla discarica, per essere poi sostituita da altri oggetti più nuovi e più apprezzabili (27 e 47).[5] In base a tale logica, il consumismo finisce per «determinare gli schemi delle relazioni interumane» (35); ciò concerne anche la formazione dell'assetto sociale, in particolare la stratificazione sociale. Gli appartenenti alla società dei consumi vengono intenzionati esclusivamente in quanto consumatori, per cui la struttura della disuguaglianza si delinea sulla base delle capacità di consumo del singolo:

3 Modernità liquida, lo ricordiamo, «è la convinzione sempre più forte che l'*unica* costante sia il cambiamento e l'*unica* certezza sia l'incertezza» (Bauman 2011, VII).

4 Bauman riprende qui la terminologia di Bruno Latour, il quale raffronta le etimologie dei termini 'fatto' e 'feticcio', derivanti dal latino *facere*. Il primo rinvia, nell'uso comune, alla verità; il secondo alla falsa credenza del soggetto, quindi a entità create dalle persone, ma adorate come se fossero divinità vere e proprie. Per Latour, una distinzione di tal tipo è perniciosa, dal momento che «[a]nche i fatti […] sono costruiti, cioè feticci, ma d'altra parte i feticci, una volta che ci sono, hanno una loro indipendenza e solidità» (Bovone 2008, 150). Per maggiori informazioni, si veda Latour 2017.

5 Seppur Bauman non abbia mai affrontato esplicitamente e approfonditamente la tematica ambientale, qui è latente la problematica ecologica delle conseguenze della «sindrome consumistica» (Bauman 2005, 89), basata sulla logica dello scarto, non solo umano, ma anche in quanto rifiuto materiale: «il consumismo è un'economia basata […] sullo spreco; […] l'unico regime nel quale la società dei consumi può assicurarsi la propria sopravvivenza» (86). Quindi, oltre alle sfaccettature propriamente analizzate dal sociologo polacco, il consumismo si caratterizza anche per la stretta correlazione con le disuguaglianze ambientali che, si sa, ricadono in modo preponderante sui più indigenti.

> Le posizioni assegnate lungo l'asse eccellenza/inettitudine della prestazione consumistica diventano il fattore fondamentale di stratificazione e il principale criterio di inclusione ed esclusione, guidano la distribuzione del prestigio e della disapprovazione sociale. (66-7)

In uno scenario in cui il consumo viene erto a diritto e dovere universale dell'uomo e in cui tutti, nessuno escluso, devono interpretare al meglio il loro ruolo di consumatore, viene postulata e propagandata una tanto fondamentale quanto ironica uguaglianza: «la società dei consumatori (pur andando contro i fatti) non ammette differenze di età o di genere […]; e nemmeno riconosce (pur andando clamorosamente contro i fatti) distinzioni di classe» (69-70). Di conseguenza, la responsabilità dell'esito del gioco consumistico ricade interamente sulle spalle dei singoli partecipanti e chi non si dimostra all'altezza è condannato all'esclusione totale in quanto consumatore difettoso:

> [L]a condizione […] per riconoscere o negare il diritto concreto, *sostanziale*, ai benefici della piena cittadinanza è la competenza consumistica di una persona […]. Coloro che non superano il test sono 'consumatori difettosi', a volte classificati come immigrati 'illegali' o richiedenti asilo 'difettosi', a volte etichettati come 'sottoclasse' […], ma nella maggior parte dei casi essi sono anonimamente distribuiti nelle statistiche dei 'poveri' […], anziché soggetti capaci di discernere/scegliere come gli altri membri della società dei consumatori. (81-2)

Insomma, gli appartenenti a tale categoria sociale ed ermeneutica sono le vittime collaterali del consumismo, costituenti quell'«aggregato di persone cui è stato negato l'accesso a tutte le classi e alla stessa gerarchia di classe […], persone senza un ruolo, che non danno alcun contributo utile alla vita degli altri» (153). La mancanza di significato, intesa come mancanza di utilità, è proprio la caratteristica principale associata a questa sottoclasse costituita da 'consumatori falliti', considerati alla stregua di parassiti la cui presenza grava sulle spalle dei consumatori affermati e bollati come scarti della società consumistica.

L'idea di una collateralità intrinseca, ossia di una disuguaglianza tanto inevitabile quanto involontaria, associata alla globalizzazione e al consumismo, emergeva già in *Dentro la globalizzazione* del 1998: «[i]l fenomeno […] 'globalizzazione' è volto a soddisfare i sogni e i desideri del turista. Ma il suo secondo effetto – un effetto *collaterale*, eppure inevitabile – è di trasformare molti altri in vagabondi» (Bauman 2001, 103-4). Precisamente, la globalizzazione viene qui presentata come la conquista di una libertà di movimento senza

precedenti nella storia dell'umanità, come un'interconnessione spazio-temporale essenzialmente positiva. Tuttavia, ciò non vale per la totalità della popolazione mondiale:

> Ciò che appare come conquista di globalizzazione per alcuni, rappresenta una riduzione alla dimensione locale per altri […]. La mobilità assurge al rango più elevato tra i valori che danno prestigio e la stessa libertà di movimento […] diventa […] il principale fattore di stratificazione sociale dei nostri tempi […]. Alcuni di noi divengono 'globali' nel senso pieno e vero del termine; altri sono inchiodati alla propria località […] essere 'locali' in un mondo globalizzato è un segno di inferiorità e di degradazione sociale. (4-5)

La mancata libertà di movimento e di scelta in un mondo in cui a impegnare il palcoscenico è l'*Homo eligens* (Bauman 2010, 78; 2001, 94) – letteralmente 'l'uomo che sceglie' – è un fattore imprescindibile dell'analisi sociale, dal momento che nella modernità liquida il criterio differenziante, il determinante della disuguaglianza, è il grado di mobilità, cioè la «libertà di scegliere dove collocarsi» (Bauman 2001, 96). Viene delineandosi una nuova polarizzazione dovuta all'annullamento delle distanze, per cui a un estremo troviamo l'*élite* della mobilità, un gruppo sociale impalpabile, isolato e privilegiato che può godere del restringimento spazio-temporale. All'extraterritorialità dei residenti del primo mondo fa da contraltare l'umiliante «territorialità forzata delle masse» (28), dei residenti del secondo mondo, per i quali la spazialità è una sorta di prigione, un destino ineluttabile. È in questo contesto che Bauman riprende il concetto di glocalizzazione, a indicare la complementarità dei processi di globalizzazione e di territorializzazione: «[s]ome inhabit the globe, others are chained to place» (Bauman 1998, 45).

Per indicare gli abitanti della globalità e quelli del locale, il sociologo polacco utilizza due metafore che hanno riscosso molto successo. I primi sono i 'turisti', coloro che fanno esperienza della libertà postmoderna, che scelgono se muoversi o se stare fermi e che, quando viaggiano, lo fanno perché lo desiderano; i secondi sono i 'vagabondi', costretti a una forma di schiavitù e disuguaglianza postmoderna che li costringe a stare sempre in movimento dato che la stasi, in un mondo fatto a misura di turista, è umiliante e dato che, ovunque vadano, sono oggetto costante di un rifiuto totale (Bauman 2001, 102-4). Di più, il vagabondo, nella società dei consumi e dei consumatori, è un «consumatore pieno di *difetti*» (106). Insomma, questi sono «gli *scarti* […], i *rifiuti* del mondo che si è dedicato ai servizi turistici» (103).

Dunque, la fase liquida del pensiero baumaniano ruota attorno al dar voce – riprendo qui la metafora di *Modernità e Olocausto* – alle

'nuove erbacce', all'*underclass* costituita da poveri, esclusi, emarginati, migranti *undocumented*, senzatetto ecc. che va a costituire quel cumulo di rifiuti umani prodotto dalla modernità (Bauman 2004, 102-3; Jacobsen, Marshman 2008, 25). Essi sono esseri umani in esubero, persone che non contribuiscono al consumo e al benessere della società e che costituiscono solo un peso: «i superflui […] sono […] un cancro che rode i tessuti sani della società, e i nemici giurati del 'nostro modo di vivere'» (Bauman 2007, 54). In *Vite di scarto*, l'intellettuale polacco sottolinea che, in un mondo come il nostro in cui le discariche e gli impianti di riciclaggio scarseggiano sempre più, viene a crearsi un ironico paradosso: «*Loro* sono sempre troppi. 'Loro' sono quelli che dovrebbero essere di meno o, meglio ancora, non esserci proprio. Invece noi, non siamo mai abbastanza. Di 'noi' dovrebbero essercene sempre di più» (45). La sovrappopolazione, per l'appunto, non sta a designare un eccesso di popolazione *toto caelo*, bensì un eccesso di vite di scarto, di persone che aumentano i costi sociali senza contribuire ai guadagni e che, in ultima analisi, «sono 'consumatori difettosi' […], 'vittime collaterali' non intenzionali e non pianificate del progresso economico» (51-2). Ciò che pare essere ancora più paradossale è il fatto che queste vittime, prodotte dal sistema vigente, non possono avanzare alcuna richiesta o rivendicazione, non possono levare alcun grido di aiuto, se non vogliono essere bollate come «parassiti» o «scrocconi del *welfare*» (69). Tutto questo sembra ancora più strano se pensiamo che, forse, i veri scrocconi del pianeta si rivelano essere i ricchi. Ciò risulterebbe chiaro a un'analisi clinica, oggettiva – penso all'enorme sproporzione tra le risorse consumate dall'*élite* mondiale e l'irrisorietà del consumo prodotto dalla stragrande maggioranza della popolazione globale –, però tale conclusione non solo non viene vista dai favoriti dalla globalizzazione, ma viene addirittura celata. Infatti,

> [È] nella natura dei nostri timori di 'sovrappopolazione', […] prendere di mira 'loro' anziché 'noi'. […] il grandioso progetto che separa i 'rifiuti' dal 'prodotto utile' non denota uno 'stato di cose oggettivo', bensì le preferenze dei progettisti. (57-8)

Dunque, cosa fare delle vite di scarto? Chiaramente, bisogna erigere difese invalicabili tra noi e gli altri. Ebbene, i rifiuti vengono ammassati tutti dietro lo stesso muro, nella stessa discarica, senza curarsi di quelle che sarebbero le caratteristiche proprie di ogni singolo individuo. Questa strategia è atta a impossibilitare, o quantomeno a rendere il più ardua possibile, l'identificazione di uno scarto umano con un essere umano degno di essere chiamato tale; non solo, tale annullamento identitario funge anche da strumento volto all'eternizzazione dell'esclusione dal circuito economico di riferimento (97-8). Conseguenza di questo atteggiamento e

della scomparsa di qualsivoglia prospettiva di riciclaggio è lo smantellamento del *welfare state*, che costituiva un cuscinetto deputato a limitare i danni della fuoriuscita dal circuito economico-produttivo e a favorire il rientro nello stesso. Lo Stato sociale si riqualifica quindi come Stato-caserma, criminalizzando i rifiuti umani e affidandoli al sistema penale (107-8).

Sebbene il loro allontanamento totale dall'orizzonte umano venga presentato come sinonimo di indifferenza, Bauman sottolinea che si tratta piuttosto di un sintomo della paura nei confronti dell'Altro, promemoria costante dell'angoscia e dell'incertezza derivanti dalla sensazione che nessuno di noi è veramente al sicuro: siamo tutti esposti al rischio di fuoriuscire dal circuito di successo e diventare scarti. Allora quello che facciamo è tentare di eliminare dal nostro campo visivo il «fantasma dell'esubero» (120):

> Odiamo quelle persone perché sentiamo che quello che stanno vivendo sotto i nostri occhi potrebbe benissimo essere, di lì a poco, la […] nostra stessa sorte. Cerchiamo in ogni modo di allontanarle dalla nostra vista: le rastrelliamo, le rinchiudiamo in campi, le deportiamo. Vogliamo esorcizzare quello spettro. (160)

La diffidenza nei confronti dell'alterità è una caratteristica sempiterna dell'esperienza umana, dal momento che, secondo Bauman, l'umano è sempre dedito a ordinare la realtà e, a tal fine, è necessario alleviare la portata distruttiva dell'Altro, dello straniero (*the stranger*), rappresentante l'ambivalenza e il disordine (Marotta 2002, 38).[6] Nonostante il tentativo di estirpare il caos rappresentato dallo straniero, si tratta in realtà di un elemento che non può essere cancellato del tutto, in quanto necessario per la costruzione identitaria: l'identità del Sé si costituisce per il tramite dell'opposizione con l'Altro; ciò vale anche per la dimensione macro-sociale, giacché il senso del 'noi' si crea in opposizione a 'loro'. Oggi, il consumatore di successo e il turista costituiscono il Sé che riafferma la propria identità nella relazione-opposizione con il consumatore difettoso e con il vagabondo (44).

4 Lo smantellamento delle false credenze e alcune implicazioni etico-morali

Negli ultimi anni della sua vita, Bauman torna ad analizzare i fenomeni sociali 'solidi' e nel 2013 pubblica «*La ricchezza di*

6 Per quanto riguarda l'ossessione nei confronti dell'ordine e la lotta contro l'ambivalenza, si vedano: Bauman 2020b; Jacobsen 2022; Junge 2008; Carleheden 2008.

pochi avvantaggia tutti» (Falso!), testo che parte dalla presa di coscienza della persistenza e dell'aggravarsi della povertà e della disuguaglianza cui assistiamo quotidianamente. È ovvio, il fenomeno della disuguaglianza, autoriproducentesi e autoperpetuantesi, non è nuovo, ma oggi assume forme e dimensioni mai viste prima. Urge, quindi, una critica della logica sottesa all'economia del libero mercato, in particolare dell'affermazione ideologica secondo la quale il profitto individuale favorirebbe l'incremento del benessere diffuso. Ciò cui assistiamo è, piuttosto, un allargamento sempre più marcato della forbice sociale:

> [I]n quasi tutto il mondo la disuguaglianza sta aumentando rapidamente, e ciò significa che i ricchi, e soprattutto i molto ricchi, diventano più ricchi, mentre i poveri, e soprattutto i molto poveri, diventano più poveri […]: i ricchi diventano più ricchi proprio perché ricchi. I poveri diventano più poveri proprio perché poveri. Al giorno d'oggi la disuguaglianza si approfondisce per la sua logica interna e in virtù del suo stesso impeto. (Bauman 2013, 13)

Alla luce di ciò, Bauman si propone di sbugiardare quella che Perocco definisce «l'ideologia della disuguaglianza» (Perocco 2012, 8-18). Si tratta di rappresentazioni ideologiche perpetrate dal potere, quali: la crescita economica come unica soluzione alle problematiche umane; la naturalità della disuguaglianza come fatto positivo per l'umanità; la necessità della rivalità, intesa come elevazione delle persone degne ed esclusione di quelle indegne.

La crescita economica non ha prodotto e non produce benessere per tutti; la mano invisibile del mercato è evidentemente guidata da un'*élite*, da quell'*élite* della mobilità analizzata in *Dentro la globalizzazione*. Anche in questo testo emerge, per l'appunto, il tema della libertà di movimento come criterio della disuguaglianza odierna:

> La 'deregolazione' delle banche e del movimento dei capitali permette ai ricchi di muoversi liberamente, di cercare e trovare i migliori terreni […] capaci di generare profitti e così diventare più ricchi, mentre la 'deregolazione' del mercato del lavoro rende i poveri […] più poveri. (Bauman 2013, 42-3)

Insomma, la teoria dell'effetto *trickle-down* non va incontro alla conferma dei fatti, in quanto l'accumulazione della ricchezza in cima alla piramide sociale provoca piuttosto un peggioramento delle condizioni di vita per la maggior parte della popolazione (47).

Tuttavia, l'idea di una naturalità della disuguaglianza sociale è un'importante alleata della teoria dello sgocciolamento verso

il basso, in quanto ci socializza alla credenza secondo la quale il benessere della società sarebbe favorito dagli sforzi di quei pochi che possiedono qualità eccezionali, per cui sarebbe giusto che essi vengano premiati per il loro impegno. Una rappresentazione di questo tipo è chiaramente accolta da quelli che favorisce, alleviando qualsivoglia senso di colpa (sempre che ce ne sia in primo luogo), ma anche dal resto della popolazione, in quanto riduce il disprezzo verso se stessi e inibisce il risentimento verso chi è più fortunato.

La rivalità, poi, si fonda su una concezione cosale dell'altro, tipica della cultura consumistica, che porta a considerare il prossimo al pari degli oggetti di consumo. Ebbene, appena la soddisfazione prodotta dagli oggetti umani cessa, essi perdono valore e vengono considerati indesiderabili, insignificanti e sostituibili. Questo è precisamente il destino che spetta ai consumatori difettosi (o 'mancati'/'manchevoli', come vengono definiti in questo testo), alle vite di scarto e ai vagabondi. Tuttavia, sovvertire tale logica mercificante non è per nulla semplice: «in questo modello di relazione cliente-merce o utente-utilità trasferito nell'interazione da-umano-a-umano […] siamo educati dalla prima infanzia e per tutta la vita» (90-1). Ciò che non riusciamo a vedere è che la relazione umano-umano è simmetrica, in quanto i due poli del rapporto sono insieme soggetto e oggetto, azione e ricezione. Finché questa interdipendenza, questa relazione di inter-retro-azione, sarà obliata, continueremo a vedere negli altri gli avversari del gioco consumistico cui partecipiamo:

> La nostra situazione è la conseguenza ultima dell'aver sostituito la competizione e la rivalità […] all'anelito umano, troppo umano, a una coabitazione basata sulla cooperazione amichevole, la reciprocità, la condivisione, la fiducia, il riconoscimento e il rispetto vicendevole. (95)

Questi ultimi aspetti di relazione positiva sono elementi fondanti la prospettiva etico-morale di Bauman che, pur mantenendo la distinzione fra *Moralität* e *Sittlichkeit*,[7] fa comunque riferimento a entrambe le dimensioni, quella individuale e quella comunitaria (Best 2016, 128). Infatti, in *Consumo, dunque sono*, mette in luce che nel contesto consumistico, un contesto iper-individualizzato e atomizzato, la responsabilità, originariamente riferentesi al dovere etico e alla preoccupazione morale per l'Altro, si rivolge solo al sé (Bauman 2010, 115). Ne deriva che l'Altro, specie l'altro che subisce disuguaglianza,

7 Riferita all'impostazione hegeliana dei *Lineamenti di filosofia del diritto*, in base alla quale la moralità richiama l'aspetto soggettivo-individuale, indicando la volontà del bene che abita nel singolo, e l'eticità, di contro, richiama la realizzazione del bene storicamente incarnato, condiviso da una comunità (Hegel 1999, 95-139).

è vittima di un'indifferenza totale. Ciò si verifica a seguito di un meccanismo particolare, per spiegare il quale Bauman si serve delle intuizioni di Emmanuel Lévinas, secondo il quale la società aiuta i suoi membri a rispondere alla sfida etica derivante dalla semplice e pura presenza degli altri e dal loro volto: «la società […] punta a neutralizzare, regolare e limitare la sfida di una responsabilità, altrimenti illimitata, per rendere possibile sopportarla e convivere con essa» (111). Ebbene, la responsabilità-verso-l'Altro deve essere diretta a un gruppo ristretto di altri, in questo caso ai consumatori di successo. Cosa fare allora dei consumatori difettosi? Cancellarli dall'orizzonte fisico ed emotivo degli abitanti legittimi del mondo consumistico:

> L'isolamento fisico può essere perfezionato e rafforzato con la segregazione mentale, che produce la messa al bando dei poveri dall'universo dell'empatia morale. Oltre che dalle strade, costoro possono essere esclusi dalla comunità umana riconoscibile: dal mondo dei doveri etici. (114)

A tal fine, le vittime della disuguaglianza sociale vengono associate a idee quali degradazione morale, abiettezza, depravazione ecc. e le si accusa di trovarsi in una condizione di miseria materiale e simbolica dovuta a colpe esclusivamente individuali, assolvendo del tutto la società intesa in senso ampio. Invero, se l'uomo è l'animale che sceglie e che è libero di operare qualsiasi scelta, queste persone si trovano in un simile stato perché sono state esse stesse a scegliere una vita patologica e, di conseguenza, non c'è nulla che si possa fare per aiutarle (164-7). Al pari degli esclusi dal gioco consumistico, anche i vagabondi sono oggetto di tale processo di adiaforizzazione, intesa come la produzione sociale dell'indifferenza (Jacobsen, Marshman 2008, 24), e ciò determina in ultima analisi la privazione dello status di soggetto morale per determinate categorie di persone. Queste vengono «relegat[e] nell'insignificanza» (Bauman 2001, 22) e sottoposte a una disuguaglianza socio-spirituale e fisica, consistente nel loro allontanamento materiale: l'altro «viene tenuto a distanza e gli viene impedito l'accesso […] a qualsiasi comunicazione. […] l'altro è costretto a restare estraneo, straniero, […] depauperato della unicità di individuo, di persona» (118). Insomma, un simile stato di cose fa sì che la solidarietà e la fratellanza diventino sentimenti pressoché sconosciuti ai più, per cui la società dei consumi, della mobilità e dello scarto costituisce un soggetto collettivo che racconta ai suoi membri

> [C]he nessuno, tranne qualche isolato vincitore, è davvero indispensabile; che un essere umano è di qualche utilità per gli altri […] soltanto a condizione di poter essere sfruttato a loro vantaggio; che la pattumiera, destinazione ultima degli esclusi, è

> la prospettiva naturale per coloro che non si adeguano più o non desiderano più essere sfruttati in questo modo. (Bauman 2007, 163)

Questo è uno stato di cose che privilegia la morale dei signori, una morale che fa della prevaricazione, dell'affermazione di sé e del dominio sugli altri i suoi princìpi cardine, inibendo qualsiasi spinta positiva, compassionevole verso il prossimo.

Insomma, per Bauman la moralità ruota attorno ai concetti e alle pratiche di esclusione e inclusione, fattori che non possono essere ignorati nel campo dell'analisi sociale delle disuguaglianze. Coerentemente, promuovere l'inclusione significa farsi carico del compito di rendere il mondo un posto morale o, quantomeno, più morale (Best 2016, 129), dal momento che, come abbiamo visto, in un mondo sempre più disuguale, a imperare è piuttosto una sempre più diffusa indifferenza nei confronti dei 'deboli'. In effetti, l'analisi morale baumaniana origina negli anni Novanta a partire dalla sua riflessione sulla postmodernità,[8] periodo interpretato dai più come il tramonto dell'etica e l'alba del relativismo, ma che Bauman vede come una nuova opportunità per l'etica, o meglio, per la moralità. Se la modernità è stata l'era dell'eticità, la postmodernità è piuttosto l'era della moralità: «[i]f modernity promoted ethics and attempted to shape moral behaviour according to ethical laws, postmodernity […] offers a 'morality *without* ethics'» (Crone 2008, 61). Egli propone, infatti, una moralità postmoderna esplicitamente ispirata alla filosofia di Lévinas, non identificabile con leggi o norme, ma fondata sull'infinita responsabilità che ciascuno assume nell'incontro faccia a faccia con l'altra persona:

> It is not a neutral, sociological 'being-*with*-the-other', where we are all subject to the same universal laws, but a 'being-*for*-the-other', where, in the presence of the Other, I must assume an absolute responsibility. (64)

La sua è, quindi, una morale della prossimità, emergente dal rapporto con un Altro specifico e in un contesto situazionale specifico. Secondo Lévinas, per l'appunto, l'Altro viene incontrato in quanto volto, simbolo di una trascendenza mai pienamente afferrabile; l'Io, d'altra parte, è determinato intersoggettivamente e, infatti, «I am not a solipsistic ego capable of choosing to be moral or not. […] I must assume an infinite responsibility for the weakness of the Other» (64). La moralità è quindi, secondo Bauman, un impulso presociale connaturato all'umano, ma ciò non significa che la società non

8 Mi riferisco qui a *Postmodern Ethics* (1993), pubblicato in Italia con il titolo *Le sfide dell'etica*.

eserciti la sua influenza nel modellare e degradare la capacità morale dell'individuo. In ogni caso, la moralità sta nell'incontro con l'Altro, in una sorta di 'vuoto etico' in cui il singolo può assumere o meno su di sé il peso della responsabilità nei confronti del prossimo.

Tuttavia, ciò non si è effettivamente realizzato nella realtà postmoderna, che non è riuscita a diventare l'età della moralità, in quanto ha finito per coincidere con la società dei consumi e la logica consumistica ha invaso anche la sfera dei rapporti interpersonali, provocando quell'estrema mercificazione delle persone che è oggetto delle opere del 'periodo liquido' del sociologo polacco:

> In the postmodern world, our relations with other human beings are primarily aesthetic. In the postmodern cities, I am not confronted with transcendent faces I can be responsible for, but with strangers presenting themselves as potential objects of pleasure and desire. The stranger passing by in the street is a body I can examine and – eventually – take pleasure from, but certainly not an unknown who urges me to assume a most inconvenient responsibility. Indifference, not responsibility, is a predominant feature of postmodern urban life. (68)

Nella postmodernità la moralità assume forma corporea molto di rado, rimanendo piuttosto un dovere irrealizzato. Ciò non toglie, però, che essa possa svolgere un ruolo fondamentale in quanto criterio regolatore nei confronti della realtà sociale e delle nostre azioni.

A partire dalla seconda metà degli anni Novanta, l'attenzione di Bauman si sposta dalla postmodernità alla globalizzazione – il fenomeno che «divide tanto quanto unisce; divide mentre unisce» (Bauman 2001, 4) – e affiora sempre più la consapevolezza che, per affrontare i problemi da essa prodotti, non è sufficiente una morale agente a un livello solo micro-sociale; risulta necessario il supporto di strumenti macro-sociali, ossia le leggi. Queste non devono essere le regole etiche adiaforiche tipiche della modernità, ma devono ispirarsi alla moralità. Se quest'ultima deve estendere il suo raggio d'azione oltre la relazione a due, deve andare a interessarsi alla questione della giustizia, intesa come ideale regolatore mai pienamente realizzabile sulla Terra.

5 Conclusione

In questo articolo si è visto che, tra il Bauman del periodo cosiddetto 'marxista' e il Bauman 'liquido', costante di un'analisi ermeneutica ancorata alla realtà effettuale è il legame irriducibile tra la disuguaglianza sociale e l'approccio etico-morale a tale questione. La globalizzazione realizza una divisione ingiusta all'interno della

società mondiale, tra turisti e vagabondi, tra consumatori di successo e consumatori difettosi, tra vite degne di essere vissute e vite di scarto, tra chi gode degli eccessi consumistici e chi paga i conti del loro smaltimento. Ne deriva che bisogna andare alla ricerca di una giustizia sociale, economica e ambientale, relativa alla distribuzione e redistribuzione della ricchezza mondiale. La sfida più grande in tal senso è dovuta al fatto che, trattandosi di un'ingiustizia globale, la morale della prossimità si rivela inadatta a tale scopo, in quanto la responsabilità morale deve estendersi anche a coloro che sono al di fuori del nostro campo visivo. L'Altro non è più colui che incontriamo faccia a faccia, ma un altro uomo senza volto (Bauman 2018a, 56-97), per cui la questione diventa «*why* this privileged global elite should assume responsibility for the poor vagabonds, since […] distance creates indifference – not responsibility» (Crone 2008, 71). Torniamo così alla domanda che Caino si era posto nei confronti di Abele: «Am I my brother's keeper?» (Bauman 2000, 5). Oggi questo interrogativo viene espresso in ogni dove, in particolare all'interno delle discussioni circa l'utilità del *welfare state*: non trovando giustificazioni utilitaristico-economiche alla sua esistenza, non si può far altro che appellarsi a motivi etico-morali. Tuttavia, pare difficile che l'argomento etico-morale raccoglierà grandi risultati in una società dominata dal profitto (7-9). La moralità non può sussistere con le sue sole forze, necessita dell'aiuto della politica, di una politica globale. Se non ci sono soluzioni locali a problemi globali, l'ingiustizia globale può essere contrastata solo da una legge globale, da una legislazione cosmopolita che si faccia davvero carico della difesa delle persone più svantaggiate a livello mondiale e che contrasti la tendenza a colpevolizzare chi si trova in condizioni di povertà ed emarginazione.

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