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Maitreyee is a starting point for academics and practitioners who are seeking a brief introduction to research and work in the area of human development and the capability approach. Each issue addresses a different topic.

Group inequality and intersectionality

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INTRODUCTION FROM THE GUEST EDITORS

The capability approach is concerned fundamentally with expanding the substantive freedoms people have to advance their reasoned values. Equity, in turn, requires that people have equal capabilities. This may not translate into similar outcomes – but outcomes will be more acceptable where they are associated with different preferences rather than different possibilities to succeed. Trying to ascertain whether outcomes result from choice or structural constraints can be challenging. It becomes less so when we see systematic differences across groups – such differences are very unlikely to be attributable to preferences and very likely to arise from a constrained opportunity structure (Robeyns 2003). Inequalities among groups, in other words, are very likely to be inequitable or unjust. 'Basic capabilities',[1] in particular, such as the ability to be nourished, literate and numerate, should not be shaped by circumstances such as gender, ethnicity or the place where one is born.

In the human development literature, Frances Stewart and others have alerted us to the importance of group-based inequalities, what she terms 'horizontal inequalities' particularly in (but not restricted to) situations of conflict (Stewart 2001, 2008). Her work has highlighted the importance of such inequalities contrasted with 'vertical inequalities', inequalities among people. Group-based inequalities tend to be more 'durable' (Tilly 1999), and to require a policy lens that is sensitive to how discrimination constrains human development attainment.

Group-based inequalities may have many sources – commonly, there has been a focus on what are known as 'ascribed' characteristics, those that are not subject to change, such as gender, age and ethnicity or religion. Others have emphasized how socio-economic status is associated with outcomes in other dimensions, such as education or health, while a large body of work considers how spatial location – subnational region, urban/rural zone, informal settlements – may determine people's life chances. Naturally, some of these demarcations are more fluid than others: people may move across socioeconomic class or geographical location. Nonetheless the strong association between class, geography and a range of human development outcomes makes these characteristics a useful focus for research, alongside ascribed characteristics, and this research carries strong policy implications.

In this issue, our focus is on a new emphasis in the study of group-based inequalities – what Naila Kabeer has termed 'intersecting inequalities' (Kabeer 2010). We begin with a contribution by Kabeer in which she draws our attention to four types of inequalities – cultural, spatial, economic and political – and argues that it is 'the mutual—and intersecting—nature of these inequalities that reinforces the persistence of social exclusion over time'. Across regions, she argues, we can trace the effects of these inequalities by looking at how different social groups – characterized by intersections of gender, ethnicity, class and spatial location – fare in relation to one another. Addressing such inequalities, she argues, is necessary for the Millennium Development Goals framework to tackle social exclusion – and requires anti-discriminatory legislation; the collection of disaggregated data; attention to the resource base,

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[1] See Sen 1980, 1992. Sen (1992) defines a 'basic capability' as "the ability to satisfy certain elementary and crucially important functionings up to certain levels" (45 n. 19, cited in http://plato.stanford.edu/entries/capability-approach/#BasCap).

infrastructure and social service needs of excluded groups; as well as social protection.

In an original contribution, Frances Stewart considers the ways in which a focus on intersecting inequalities differs from horizontal inequalities (HIs). She notes that analysis of HIs includes both intersections among group identities ('identity intersectionality') and intersections among dimensions of human development ('dimensional intersectionality') – e.g., the extent to which a particular group may be disadvantaged both in health and in education – though it pays more attention to the latter. Stewart suggests that each focus may be more relevant at times, depending on whether disparities are linked more to particular group characteristics or to their intersection.

The contributions of Kabeer and Stewart have considered the concept of 'intersections' largely as an analytical tool to understand better the diverging fortunes of particular groups and the implications of this inequality. Leah Bassel provides a different perspective in considering the roots of 'intersectionality' in African-American feminist thought, and the vital political potential that it affords for people who are experiencing the 'simultaneous and interacting effects of systems of oppression on the basis of gender, race, religion, class, sexual orientation and national origin as categories of difference'. She notes its importance as a source of empowerment for marginalized women at the crossroads of multiple forms of discrimination, and in developing anti-discrimination law and policy that does not treat forms of discrimination such as racism and sexism as parallel but rather as interacting.

What difference do these perspectives make in practice? The two remaining contributions to this newsletter consider the practicalities of taking group inequalities – and the ways in which they intersect – into the policy realm. We explore the connection to policy debates around a post-2015 framework agreement to replace the Millennium Development Goals, in the light of the call of the High Level Panel on post-2015 to 'leave no one behind' by tackling group-based inequalities: 'We should ensure that no person – regardless of ethnicity, gender, geography, disability, race or other status – is denied universal human rights and basic economic opportunities' (U.N. High-Level Panel of Eminent Persons on the Post-2015 Development Agenda 2013).

Kevin Watkins considers how group equity can be taken into account in target setting under a post-2015 agreement. He argues that goals to eliminate poverty in its various forms be accompanied by what he calls 'stepping stone' equity targets that focus on equitable progress that eliminates disparities between groups. A target to eliminate preventable child mortality, for example, could have intermediate country level targets that focus on ensuring that a disadvantaged group progresses more quickly. In this way, progress would be accompanied by a narrowing of the gap between advantaged and disadvantaged groups.

Finally, the editors of this volume highlight the need for the systematic collection of data on group-based inequalities to meet the ambition to 'leave no one behind' under a new post-2015 framework agreement. The piece points to the challenges posed by the need for data on groups facing disadvantage along one or more characteristics, and to some ways in which

disaggregated data could be collected in a targeted way at a relatively low cost – in particular by exploiting new methods to link data between disparate sources, and by harnessing new technologies. If we can find a way to make these connections effectively, we argue, then we can maximize the potential of a new agreement to advance an equity-based agenda – otherwise, we risk working in silos with limited results.

We hope that this Maitreyee will stimulate theoretical and empirical debate within the HDCA regarding the importance of intersecting inequalities – a subject that has increasing importance to debates over a post-2015 framework, as well as broader theoretical and empirical relevance.

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Insights

THE CHALLENGES OF INTERSECTING INEQUALITY[2]

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In almost every society and region of the world, certain groups of people face systematic social exclusion as the result of multiple inequalities that constrict their life chances.

These include:

- ✓ Cultural inequalities: forms of discrimination and 'de-valuation' that assign members of these groups lesser status and worth than others;

- ✓ Spatial inequalities: such groups frequently live in places that make them harder to reach, or easier to ignore;

- ✓ Economic inequalities: these groups are often disadvantaged by an unfair distribution of assets and opportunities; and

- ✓ Political inequalities: they are deprived of voice and influence on the critical issues that affect their lives and their communities.

Each of these inequalities is a source of injustice in and of itself. But it is the mutual—and intersecting—nature of these inequalities that reinforces the persistence of social exclusion over time and its resistance to 'business as usual' approaches to the Millennium Development Goal (MDGs). Policymakers who want to tackle social exclusion need to understand both sides of this equation: what explains the persistence of social exclusion and what measures have achieved progress. This note answers to both of these questions systematically.

The cultural dynamics of exclusion

Cultural 'de-valuation' is a key mechanism through which social exclusion is perpetuated over time. Such a mechanism can work in silent and invisible ways that nevertheless have a profound impact on those who are excluded in this way; or it can work in ways that are visible and noisy, with negative spillover effects on the larger society.

In Nepal, a new constitution adopted in 1990 was designed to reverse official endorsement of

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[2] This note is an extract from: (1) Kabeer, Naila (2010) Can the MDGs provide a pathway to social justice? The challenge of intersecting inequalities, New York: United Nation Development Programme; (2) Kabeer, Naila (2011) MDGs, Social Justice and the Challenge of Intersecting Inequalities, Centre for Development Policy and Research, Policy Brief No. 3. It has been condensed by José Manuel Roche.

long-standing caste and gender discrimination, but inherited inequalities have continued to adversely affect the lives and life chances of those at the lower end of the social hierarchy. For example, a recent survey revealed that the upper castes scored twice as high as Dalits on knowledge about rights and procedures, confidence in accessing services, and ability to exercise rights, benefit from social networks and have local political influence.

A revealing experiment from India found that Dalit school children performed as well as children from other caste groups in solving puzzles when caste identities were concealed. They performed less well when their caste identities were revealed, and even more poorly when the children playing the game were segregated into separate caste groups. If such a finding can be generalised, it suggests that the 'internalisation' of ascribed inferiority has a powerful effect on the capacity of excluded groups to respond to social and economic opportunities.

The economic dynamics of exclusion

Economic discrimination frequently operates through cultural norms and practices that define one's social position. In some cases, excluded groups are not permitted to own or buy land by virtue of who they are. This has long been the case for the 'untouchable' castes in India and Nepal, and even today the vast majority of people belonging to these castes are landless. In other cases, ethnicity determines the amount and quality of land people own.

The kind of livelihoods pursued by excluded groups can constitute a major factor in reproducing their poverty and excluded status. In Thailand, for instance, the reliance of the Hmong, Akha, Lahu and Lisu on swidden agriculture in upland forested areas is perceived by others to signify their 'uncivilised' way of life, in contrast to the settled wet rice cultivation practised by lowland villagers.

In other cases, there is a cultural assignment of excluded groups to the worst paid and most demeaning jobs – such as the jobs assigned to lowest castes in the Hindu caste system in India and Nepal. More generally, a combination of discrimination and associated lower levels of educational attainment keep socially excluded groups confined to lower paid work and more exploitative working conditions. This is the case of migrant ethnic minorities in Vietnam who earn half as much as those from the Kinh majority, and are less likely to have a contract or receive help in finding a job.

In both South Africa and Brazil, the interaction between gender, ethnicity and class generally places women from ethnic minorities at the bottom of the income hierarchy. Lack of access to financial services, or access on extremely usurious terms, has been a major constraint for socially excluded groups everywhere. In India, Pakistan and Nepal, the prevalence of bonded labour among lower caste and ethnic minority groups is a stark indicator of the unfavourable terms on which such groups obtain credit. Moreover, such forms of indebtedness can serve as a mechanism for the inter-generational transmission of poverty, since the children of bonded labourers often become bonded labourers themselves.

The dynamics of exclusion in service provision

Poor socially excluded groups, more than any other group, rely on basic public services to meet their needs for health and education. The failure of such services to address their needs is a major factor in explaining the uneven pace of progress across social groups on the MDGs focused on social conditions.

In India, the most important source of variation in the public per capita provision of doctors, nurses and teachers in rural districts is differences in religion and caste: the higher the percentage of Dalits and Muslims in the district population, the lower the provision of medical and educational services. Caste and religion also affect the quality of health services. Acts of discrimination against Dalits are frequently reported in the public health services, along with prejudice towards religious minorities.

Ethnic differentials also affect service provision in Vietnam. Although only 17% of women give birth without a trained health worker in attendance in the country as a whole, 33% do so in the Northeast, 40% in the central highlands and 65% in the Northwest. These are poor mountainous regions with sizeable ethnic majorities.

In Nigeria there are large disparities in social conditions between north and south. Only 4% of women in the Northeast, where ethnic minorities predominate, receive care from a doctor compared with 52% of women in the Southwest. Also, only about 8% of mothers in the Northwest deliver their babies in a health facility compared with about 74% of women in the Southeast.

The political dynamics of exclusion

When inequalities based on social exclusion are reproduced in the exercise of political power and access to public institutions, they undermine the confidence that excluded groups have in the government's ability to rule fairly. Socially excluded groups are often minorities, and there is often little incentive for political parties to take their interests into account.

However, when their political opportunities for voice and influence are systematically denied, their grievances can spill over into conflict. Ethnic or group conflicts are almost universally associated with political inequalities, and these are frequently related to educational and income inequalities.

Social exclusion does not inevitably lead to conflict, but it significantly increases the likelihood. For instance, according to a report by the Indian government into the long-standing Naxalite insurgency, the movement's main support has come from Scheduled Castes and Scheduled Tribes. Several years of civil conflict at the end of the 1990s in Nepal were also related to social exclusion of *Dalits* and preceded by political dominance of *Brahmans* and *Chhetris.*

In Mexico, the Zapatista uprising in the State of Chiapas can be traced to a long history of exploitation, exclusion and injustices towards the indigenous population, and is rooted in intersecting inequalities based on ethnic identity, location and poverty. In Chiapas (where the concentration of Mexico's indigenous population is very high), the proportion of the people who live on incomes below the minimum wage has been nearly three times higher than in Mexico as a whole. One of the major reasons is that they have been excluded from land reform efforts and consigned to poor and ecologically vulnerable land.

Policy Options to Tackle Social Exclusion

Social exclusion undermines progress on the MDGs and betrays the promise of social justice contained in the Millennium Declaration. Yet the MDG framework could be used to tackle social exclusion if greater attention were paid to the social, cultural and political dimensions of policies along with their technical and economic dimensions.

- ✓ *A comprehensive policy on the collection and dissemination of information:* Governments need to collect appropriately disaggregated data on all their citizens in order to track their progress—or their failure to progress—as a result of development efforts.

  Such data should be widely available (especially to excluded groups themselves), be subject to critical analysis and be used to inform policy measures as well as civil society advocacy efforts. Within this context, the media can be a powerful ally in the fight against discrimination and should be mobilised to inform and educate in ways that help to break down the barriers between excluded groups and the rest of society.

- ✓ *Legislation against discrimination:* Legislation can act as a sign of a government's commitment to social justice and can provide advocacy groups the support that they need to take action. However, where social inequalities are deeply entrenched, more pro-active measures might also be necessary. For instance, many countries have sought to take *affirmative action* on behalf of excluded groups in order to break with past patterns and set new precedents for the future.

- ✓ *Strengthen the resource base of excluded groups to tackle economic exclusion:* Land reform and land titling programs are important measures for transferring assets to excluded groups. Labour regulations can provide formal protection against the exploitation of workers from excluded social groups but they are most likely to be enforced when workers themselves are sufficiently organised to exert the necessary pressure.

- ✓ *Infrastructure interventions to tackle spatial disadvantage:* These interventions include investment in transport and communication, water and sanitation, and social service infrastructure. They seek to simultaneously address the specific underdevelopment of excluded groups and to connect them to economic mainstream.

✓ *Improving the outreach, quality and relevance of basic social services: For example, the* abolition of user fees and the implementation of social transfers to offset costs or provide incentives to access services (such as children's education and maternal healthcare) can be powerful mechanisms to address such problems.

✓ *Social protection measures:* In order to improve livelihoods and enhance the resilience of poor people in the face of various shocks and crises. Among those programs found to be most beneficial to excluded groups are conditional and unconditional transfers, often targeted to children, the elderly or the poorest sections of society.

Enabling macro-environment

Such programmatic interventions will not achieve a great deal without an enabling macro-environment. On the economic front, it is evident that recent patterns of growth in many countries have not reduced—and have often, in fact, exacerbated—economic inequality and social exclusion.

Macro-economic frameworks that promote broad-based growth and a general expansion of economic opportunities are most likely to benefit marginalised social groups. However, such policies would still need to be supplemented by redistributive policies that directly address the intersecting dynamics of social exclusion that impair access to economic opportunities.

Fiscal policies are an important instrument for redistribution. For example, the allocation of public expenditures to particular sectors and services and the distribution of social transfers and subsidies can directly improve the social services and the forms of social protection that are of greatest relevance to poor and excluded groups.

On the governance front, the construction of a more inclusive 'social contract' between responsive states and active citizens can provide the enabling framework for the comprehensive approach that is needed to tackle social exclusion. Such a contract would also need to incorporate solid commitments to transparency, accountability, democratic participation and civic values.

Given their isolation from the mainstream of their society, the organisation of socially excluded groups and their mobilisation around self-identified needs, interests and priorities is a critical precondition for success. Such organisations can be built through the setting up of citizens committees, user groups of various kinds and consultative exercises; or from below, through the self-organisation of excluded groups or through the support of civil society intermediaries.

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HORIZONTAL INEQUALITIES AND INTERSECTIONALITY

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These two concepts are quite closely related.

Horizontal inequalities (HI) are inequalities between groups, where the groups are defined by some salient aspect of identity: for example, by ethnicity, race, religion, or gender. The concept of HI contrasts with that of vertical inequality (VI), defined as inequality among individuals.

People have multiple identities and are thus members of a number of groups simultaneously. Where each of the several groups of which they are members face adverse HIs, then as individuals they are particularly likely to be deprived – e.g. indigenous women in Peru (Barrón Ayllón, 2005).

Inequalities can be measured in different dimensions, reflecting important aspects of people's lives. Four critical dimensions are:

- ✓ Economic which include inequalities in ownership of assets – financial, natural resource-based, human and social. They also include inequalities of incomes and employment opportunities.

- ✓ Social, which include inequalities in access to a range of services – education, health and housing –in health and educational outcomes and in social networks.

- ✓ Political HIs consist in inequalities in the group distribution of political opportunities and power, including control over the presidency, the cabinet, parliamentary assemblies, the army, police and regional and local governments. They also include inequalities in people's capabilities to participate politically and voice their needs.

- ✓ Cultural status HIs refer to differences in the recognition and status of different groups' cultural norms, religious practices and languages.

HIs are unjust: they handicap individuals as a consequence of factors outside their control – because of their race or their gender for example. While some justify VI as necessary for incentives and allocational efficiency, and to reward particular efforts, these arguments do not apply to HIs (Stewart, 2014). Moreover, there is clear evidence that the larger HIs, the greater the risk of violent conflict (Stewart, 2008). This has been shown by case studies and econometric investigations across and within countries. Violent conflict is most likely to occur when there are consistent HIs in several dimensions, especially an overlap between socio-economic and political HIs, since political HIs provide leaders of groups with a motive for mobilizing supporters, while socio-economic HIs generate grievances among those who are being mobilized (Cederman et al., 2013). Indeed, there is often (but not always) an explicit reference to several dimensions of HI, in rebels declarations – for example the 'Chartre du Nord' in Cote d'Ivoire which referred to the treatment of Islam, as well as socio-economic deprivations (Langer, 2005).

HIs tend to be persistent, over many generations. While individuals may be able to improve their position in society, groups as a whole rarely can: there are many examples of persistent HIs, such as blacks in the US, northerners in Ghana, Aborigines in Australia or Catholics in Northern Ireland. Such inequalities are persistent partly because of long-lasting discrimination; but also because of interactions between different types of deprivation (or privilege), so that deprivation in one aspect reinforces deprivation in other dimensions – for example, the children of indigenous people in Peru with low and productivity and incomes may have little or no schooling, and consequently they too have low incomes when they grow up (Stewart, 2009). Moreover, even if children do get schooling discrimination and asymmetrical social networks worsen their employment prospects and trap them in poverty. Because of its enduring effects, outlawing current discrimination is not enough as its legacy lives on. Consequently, policies to correct HIs need to address deprivations comprehensively. Action in relation to just one aspect is likely to be ineffective.

Clearly, the concept of intersectional inequalities overlaps in a major way with that of HIs. The literature suggests two types of intersectionality:

- ✓ Intersection of (disadvantaged or advantaged) identities – such as being a woman and a slave, or a white European male. We could term this identity intersectionality.

- ✓ Intersection of dimensions of deprivation, such as a group being deprived simultaneously in both economic and political dimensions. We could term this dimensional intersectionality.

The analysis of HIs includes both types of intersectionality, but with more emphasis on dimensional intersectionality.

Intersection of disadvantaged or advantaged identities occurs as a consequence of every person having multiple identities; empirical investigation of HIs has identified intersecting HIs of this kind - notably that women in deprived groups typically form the most deprived category.

However, to date not a great deal of emphasis has been put on this type of intersection HIs, since our aim has been to identify the consequences of HIs for social stability and cohesion, not to identify group characteristics of the most deprived individuals.

Another form of identity intersectionality is of particular relevance to consideration of the relationship between HIs, political stability and social cohesion – that is overlapping identities. These occur where there are two (or more) types of identity which broadly overlap in membership – such as religion, ethnicity and geography in Nigeria. In such cases, the overlap (or intersectionality) can reinforce group identity and make mobilisation easier and conflict more likely. In contrast, where this type of intersectionality is absent (such as in Northern Ghana where there are differences in religion among people of the same ethnicity), mobilisation for violence becomes less probable. Overlapping identities also lead to less contact across identity groups, and consequently less social cohesion. An example is Malaysia, where each of the three major groups differ in race, religion and language and where, as a result, there is a sort of 'silo' society, with little social interaction across the groups.

Dimensional intersectionality lies at the heart of much analysis of HIs. It is of relevance to the likelihood of conflict, since it is where political and socio-economic HIs are present and consistent that conflict becomes most likely. In addition, dimensional intersectionality is of relevance to the persistence of HIs because, as noted earlier, deprivation (or privilege) in a range of dimensions reinforce deprivation in each individual dimensions and deprivation overall (or privilege).

While, therefore, there are major overlaps (intersectionality?) between the two approaches, there are also differences.

- ✓ The intersectional approach is, tautologically, looking for intersections. But the HI approach is looking for the causes and consequences of horizontal inequalities, to which intersectionality of both identity and dimension are relevant and need to be explored, but these are not the only relevant factors, and may not always be relevant. Indeed, excessive focus on identity intersectionality can draw attention away from the big issue as far as conflict and social cohesion is concerned – which is inequalities between groups as a whole – including men and women, old and young - in a range of dimensions.

- ✓ Data needs are broadly similar. An HI approach needs data on the full range of dimensions along significant identity lines. Disaggregation by income class within each group is also needed. Disaggregation within each group by gender and age, which lies at the heart of identity intersectionality, is desirable but not essential.

- ✓ Interpretation of which dimensions are critical may differ. The HI approach, because of its concern with political stability, is primarily interested in dimensions which are likely to be provocative. Thus on the political dimension, it is less a matter of 'voice' and 'participation' (main elements in the intersectionality approach) and

more of actual political power, as shown by membership of the cabinet, or major military or bureaucratic officers. On socio-economic dimensions, land ownership and employment may be more relevant variables than incomes or consumption even if the latter are more nearly related to personal wellbeing.

✓ For the HI approach, it is important to be able to have some summary measure of HIs for each society, and some progress has been made on this (Mancini et al., 2008). The intersectionality approach seems to focus on measuring intersectionality in particular cases rather than seeking a societal measure.

✓ Policy approaches are similar. Both put great emphasis on outlawing discrimination; both agree that affirmative action is often needed; and both agree that a comprehensive multidimensional approach is required. However, the HI approach would be particularly concerned to correct group HIs as a whole, while the intersectional approach would be more concerned with those categories which are particularly deprived because of intersectionality.

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INTERSECTIONALITY[3]

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Scholars of intersectionality have drawn our attention to the simultaneous and interacting effects of systems of oppression on the basis of gender, race, religion, class, sexual orientation and national origin as categories of difference. They have advanced a powerful critique of mutually exclusive categories such as 'woman' or 'black' that serve to mask intersecting and interacting relations of domination and inequality. Decades of research and a recent explosion of work shows the concept to be exciting and open-ended, generating fierce debate even among its advocates. This piece will explore origins, an example of its use and key debates.

Origins

One of the earliest historical reference points for 'intersectionality' is the famous speech of Sojourner Truth, an African-American woman born into enslavement who campaigned for both the abolition of slavery and equal rights for women and challenged the separation of the two. In a famous 1851 speech 'Ain't I a Woman?', at the Women's Rights Convention in Ohio, she famously demanded her rights both as a 'Negro' and as a woman (Gates and McKay 1997), predating by a century contemporary feminist work on gender identity (Brah and Pheonix 2004: 76-7). Her powerful words laid the foundations for work that has since fallen under the term 'intersectionality'. Scholarship in the field owes a fundamental debt to Sojourner Truth, and to subsequent work that was born out of the struggles of African-American women and which emphasizes this vital, political dimension of intersectionality.

Critical race scholar Kimberlé Crenshaw has written the most cited texts on intersectionality (1989, 1994). She has demonstrated that legal frameworks that focus on either race or sex cannot capture the experiences of marginalised women who are at the crossroads, and simultaneously experience both forms of discrimination. Crenshaw insists that intersectionality is not just a structural matter of diagnosing the ways in which intersecting forms of inequality are relevant for individuals but also political because it indicates the way in which these intersections are relevant to political strategies, particularly the (positive and negative) effects that strategies on one axis have on others.

In Black Feminist Thought (2000) Patricia Hill Collins places Black women's ideas and experiences at the centre of analysis. Black women occupy an 'outsider-within' status as a result of their unique history at the intersection of mutually constructing systems of oppression (race, class, gender, sexuality and nation). Collins' project is to empower African-American women within the context of social injustice sustained by intersecting oppressions. 'Intersectionality' refers to particular forms of intersecting oppressions that cannot be reduced

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[3] This piece is excepted from an encyclopedia entry on 'Intersectionality' prepared by Leah Bassel that is under review by Naples, N., Hoogland, R.C., Wickramasinghe, M. and Wong, A. (Eds), Wiley-Blackwell Encyclopedia of Gender and Sexuality Studies (Forthcoming, 2015), Chichester: Wiley-Blackwell. It is condensed by Emma Samman.

to one fundamental type within a matrix of domination in which intersecting oppressions are organised socially (2000: 18). Intersecting systems of domination can be analysed according to their organisation in four distinct yet interrelated domains of power: structural (laws, interlocking large-scale institutions), which organizes oppression; disciplinary, (bureaucracy, administration) which manages it; hegemonic, (ideology, culture, consciousness), which justifies it; and interpersonal (level of everyday social interaction) which influences everyday life and individual consciousness (2000: 277-90).

In the seminal work of Crenshaw, Hill Collins and other African-American scholars of intersectionality and the members of the Combahee River Collective (1986), intersectionality is explicitly a political project best expressed in the title of Gloria Hull, Patricia Bell-Scott, and Barbara Smith's 1982 collection *All the women are white, all the Blacks are men, but some of us are brave: Black women's studies.*

In the United Kingdom, Black British feminism developed with postcolonial migration from the Caribbean, Africa and the Indian sub-continent. Hazel Carby's "White Woman Listen!" (1982), Pragna Patel and the highly successful organization the Southall Black Sisters, and the political and academic work of many other Black Feminist scholars has provided a similarly powerful legacy in the United Kingdom (Mirza 1997). This legacy is not always properly acknowledged in the intersectionality literature.

Beyond Europe and North America, postcolonial feminist scholars have generated powerful critiques of 'Western feminism'. Chandra Talpade Mohanty has focused on global feminist projects and the 'imperial gaze' that constructed 'Third World women' as homogeneous (1984). These links and parallel legacy have yet to be fully recognised in intersectionality research, which predominantly focuses on the United States and Europe.

Uses

In recent years, the concept of intersectionality has travelled across disciplines at a dizzying pace including sociology, political science, public policy, anthropology, cultural studies and, of course, gender and sexuality studies. Much empirical work, which covers too many areas to explore in detail, has demonstrated the inequalities and challenges within groups, e.g. women, as well as across them (see Box). This understanding has been enshrined in international human rights politics, in documents such as the 1995 Beijing Platform and Declaration, which recognised that women do not only experience discrimination and human rights violations on the basis of gender but also face multiple barriers to their empowerment and advancement because of such factors as their race, age, language, ethnicity, culture, religion or disability status, or because they are indigenous people.

Intersectionality has also operated as a tool applied to address policy problems, notably in the context of gender mainstreaming and the attempt to tackle multiple and simultaneous forms of discrimination. The goal has been to develop anti-discrimination law and policy that does not treat forms of discrimination such as racism and sexism as parallel but rather as interacting.

Proponents argue for a multiplier effect rather than a simple addition of racism + sexism + other forms of discrimination. Many scholars now examine whether these attempts have been successful, particular in 'single equalities bodies' that try to make these combinations in addressing different forms of discrimination.

Box – An example: Applying intersectionality to migration studies

In social science research, the field of migration studies illustrates the attempt to capture this multiplicity and simultaneity. Using an intersectional lens, scholars of migration in different contexts have brought to the fore not just the different ways in which men and women experience processes of migration but also how race, class, religion and disability status also fundamentally shape this process. Migration scholars explore the dynamic nature of gender relations as they are shaped by economic, social and politics changes brought by migration and by new experiences of racialization and shifts in legal and social status in the 'host' state (Anthias and Yuval-Davis 1993; Bassel 2012).

The question of national membership has also been reframed using intersectionality as a tool. In her work on the politics of belonging, Nira Yuval-Davis challenges simplistic ideas about collectivities constructed along ethnic and national lines, recognising that people who are differently located socially, economically and politically within collectivities are going to experience these boundaries and political projects differently, and also generate creative alternatives (Yuval Davis 2012).

Debates

Scholars adopt different understandings of the component parts of an intersection. Debate over 'what counts as "intersectional"?' (Taylor 2010) provides good insight into the dynamism of intersectionality research.

One common objection to intersectionality research conflates it with 'identity politics', along with the argument that identity claims are somehow inherently oppressive and therefore illegitimate. Scholars of intersectionality have pointed out that this undermines how people draw on identity as a source and form of resistance (Erel et al. 2010). It is important not to restrict intersectionality to identity in ways that are politically divisive and 'essentializing' (Phoenix and Pattynama 2006: 187), (Hill Collins 2000). Some focus instead on the interaction of categories, either making the effects of interaction visible by relating them to macro social structures (Weldon 2006) or by focusing on the ways in which processes of positionality and location in social divisions (which do not necessarily correspond to identities) are constructed and interrelate (Yuval-Davis 2006) or co-evolve and are mutually adapt in the process (Walby 2007). The socially constructed nature of categories is often recognised as a starting point and accompanied by the claim that, while "artificial", these categories nonetheless have very real consequences in the lives of black women (Jordan-Zachery 2007).

Others draw on the intersectional canon but move away from the use of 'intersectionality' favouring instead a focus on processes of differentiation and systems of domination rather than identities and categories, e.g. racialization and racism rather than 'race'; gendering, patriarchy and sexism rather than gender (Dhamoon 2011).   The focus is not on the component parts of the intersection but what the interaction at this point reveals about power and struggle.

However, some have expressed concerns that promoting multiple social justice claims or intersectionality may inadvertently encourage or promote competition between different groups as they vie for recognition and decision-making power within institutional spaces (Squires 2007). Ange-Marie Hancock notes that this could lead to competition reminiscent of what Elizabeth Martinez terms the 'oppression Olympics' (Martinez 1993) where groups compete for the mantle of 'most oppressed' to gain the attention and political support of dominant groups as they pursue policy remedies, leaving the overall system of stratification unchanged (Hancock 2007: 6). Still others worry that the political content of intersectionality has been emptied altogether, and the genealogy of the concept in anti-racist and feminist politics has been lost, leading to a 'simple listing of differences' (Erel et al 2010).

In spite, and indeed because of this dynamic questioning, intersectionality has generated productive debate – indeed its buzzword status has been seen as a marker of its success (Davis 2008). Future work connecting legacies and processes across time and space, beyond Europe and North America, are certain to further shake our certainties and enrich our scholarship.

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In Practice

LEAVING NO-ONE BEHIND:
AN EQUITY AGENDA FOR THE POST-2015 GOALS[4]

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Motivation

When the going gets complex it helps to reach for a simple guiding principle. One of my personal favorites comes from Mahatma Gandhi. 'Recall the face of the poorest and weakest person you have seen', he wrote shortly before his death 'and ask if the step you contemplate is going to be any use to them'. As a guide to international cooperation on development, that's tough to top.

Something of Gandhi's ethos underpinned the report of the High Level Panel (HLP) established by the UN Secretary-General to make recommendations on the post-2015

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[4] This piece is excerpted from an ODI think piece, *Leaving no-one behind: an equity agenda for the post-2015 goals* available at: http://www.odi.org/sites/odi.org.uk/files/odi-assets/publications-opinion-files/8638.pdf. It is condensed by Emma Samman.

international development goals.   Recognizing that inequality is holding back human development around the world, the report makes a powerful case for a focus on the poorest and most marginalized.

Yet since the report's publication, political momentum behind the development of a post post-2015 framework has faded. The 'leave no one behind' principle, proposed as the first of five core principles for the post-2015 Millennium Development Goals (MDG) framework, has not been championed by the civil-society groups and governments that might have been expected to step up to the plate. There is now a real and present danger that the HLP's recommendations will be forgotten.

'Leave no-one behind' puts social justice and equity at the heart of the wider agenda for eradicating extreme poverty by 2030. One of the failings of the MDGs was the lack of attention paid to social disparities,[5] as distinct from national average progress towards the 2015 targets. Some countries have progressed towards the goals despite growing inequalities – an outcome that violates the spirit of the MDGs, if not the letter. While the past decade has been a good one for human development, social disparities linked to wealth, gender, ethnicity and other markers for disadvantage have acted as a brake on progress towards the MDGs. Being born to a poor household in much of Africa elevates the risk of early death by a factor of five. And being a poor rural girl in Pakistan more than triples the risk of being out of school. These are the type of disparities that the post-2015 framework has to address.

More broadly, at a time when inequality is a source of growing public concern and political mobilisation around the world, the 'leave no-one behind' agenda provides an opportunity to ground the post-2015 framework in a wider social justice agenda.[6] While the contexts vary across countries, that agenda is at the heart of growing public concerns and political mobilisation to counter what are seen as unjust inequalities. At a time when multilateral cooperation on development is weakening, poverty is slipping down the global agenda and – to put it bluntly – public interest in international development is waning in rich countries, the post-2015 goals could reinvigorate a Millennium Development Goals (MDG) project that is running out of steam and lacking public appeal.

'Leaving no-one behind' is not quite a vision – but it's a big step in the right direction. The challenge now is to ground the vision in a practical post-2015 framework that might, in a small way, support efforts to accelerate poverty reduction and reduce the extreme inequalities holding back progress in many countries. Few governments would turn up at an international meeting and actively oppose a development strategy based on 'leave no-one behind' principles, just as few would contest 'pro-poor growth' or 'shared prosperity'. These are the motherhood-and-apple pie staples that have launched a thousand summits. But converting principle into practice is an elusive quest – and we lack a roadmap for converting equity principles into measurable targets.

My view is that we could provide such as road-map through equity benchmarks geared towards

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[5] http://www.odi.org.uk/publications/6340-inequality-post-2015-mdgs/
[6] http://www.odi.org.uk/publications/7415-equity-inequality-humandevelopment-post-2015-framework/

ambitious goals set for 2030. These benchmarks could be thought of as stepping stones. Set on a rolling basis over a three-to-five year period, they would focus on narrowing disparities between social groups, thereby acting as a catalyst for accelerated progress towards the 2030 goals. The design of the goals and the metrics would have to be elaborated through a process of dialogue. For reasons explained below, there are compelling grounds for avoiding equity targets related to income and monetary wealth (though far more should be done to monitor and report on outcomes in this area). The focus should be on narrowing and eliminating disparities in basic life chances, including the chance to survive childhood and flourish through education regardless of circumstances such as wealth, gender, race and other markers for disadvantage.

Reinforced by equity stepping stone targets, the 'leave no one behind' agenda could do for equity what the MDGs did for poverty reduction. Governments signing up for the framework could commit to benchmarks for reducing social disparities and to monitoring performance. They could commit also to reporting on outcomes to their own citizens, as well as the international community. Aid donors could refocus their programmes on the most marginalised people. As stepping stones, the targets in question would supplement, not displace, the 2030 goals for eradicating extreme deprivation.

The case for equity 'stepping stones'

Take child mortality as an example. In pursuing the elimination of unnecessary child deaths, governments could set 3-5-year targets, such as halving the death rate gap between the richest and the poorest, between the best-performing and worst-performing region, and between, say, ethnic minorities and the national average. In education, they could target the elimination of school attendance gaps between rural girls and urban boys or the progressive reduction in learning disparities across districts.

These are just illustrative cases. In practice, there are a wide range of metrics and targets that would have to be considered. Child survival and primary school attendance are important but somewhat minimalist indicators. Countries at higher levels of development might want to consider a wider range of health outcomes and postprimary education indicators. Qualitative indicators are also important. For example, reducing learning disparities between the best and worst performing schools and districts; or reducing quality of life gaps in health could be considered. Similarly, there needs to be a debate about the metrics: should equity targets focus on rich-poor divides or the gap between the bottom of the distribution and the median or average?

Of course, data consideration will determine possible answers to these questions. Where data constraints limit the scope for monitoring, the proper response is to improve the data, not to lower the ambition. The metrics would have to be debated, and the targets calibrated in the light of national dialogue. But the principle of tracking the elimination of unfair and unjust disparities in life chances should not be open to compromise.

There are a number of advantages to the equity stepping-stone approach. Unlike goals set for 2030, which are too remote to inform policy, near-term equity targets have the potential to turn the public-policy spotlight on the strategies needed to reach those who are being left behind. In the case of education, they might prompt policy-makers to look beyond building classrooms and hiring teachers to the challenges posed by reaching child labourers, girls trapped in early marriage, slum dwellers and the disabled, for example.

This would imply a marked shift in policy beyond the silos that the MDG framework may inadvertently have reinforced. For example, one of the reasons that progress towards universal primary school enrolment has stalled with 57 million children still out of school is that governments have failed to target the most marginalised.[7] The low hanging fruit in terms of accelerated progress was collected through the elimination of user-fees and classroom construction programmes. Today, over one-quarter of out-of-school children are denied an education because they are forced by poverty into labour markets.[8] Changing this picture will require policies that look beyond the education system to the regulatory, employment, and wider poverty interventions needed to combat child labour.

Without stretching the point, well-framed steppingstone targets under the post-2015 framework could do for equity what the MDGs did for poverty. The MDGs were one element in a wider current that shifted the locus of international cooperation. That current was reflected in the development of policy tools like the Poverty Reduction Strategy Papers (PRSPs), sector-wide approaches to health and education and medium-term expenditure frameworks that grounded poverty goals in the wider public policy environment. The World Bank's Comprehensive Development Framework was, in part, traceable to the MDGs. Equity goals enshrined in the post-2015 framework could help to underpin similar innovations. For example, how about every country signing-up for the post-2015 goals preparing a National Equity Strategy Paper setting out the benchmarks for measuring progress towards more equal opportunity, and the policies for delivery?

Equity targets also tick two additional boxes. The first is flexibility. Rather than impose a top-down straitjacket, equity targets could be calibrated on a country-by-country basis in the light of data availability, and informed by national dialogue and the perspectives of civil-society groups working with the poor.

The second box is marked universality. For too long, the MDGs have been viewed through the lens of an old-world North-South filter, with poor citizens in poor countries the primary target. If 'leaving no-one behind' is the litmus test of commitment to social justice and equity, surely it must also be applied to rich countries. Countries like the United States could signal a commitment to the spirit of the post-2015 goals by embracing targets for, say, halving the infant mortality gap between African American people and the rest of society. Similarly, the United Kingdom could use the post-2015 process to report on progress in narrowing national inequalities in health and education.

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[7] http://www.unesco.org/new/en/education/themes/leading-the-international-agenda/efareport/reports/2010-marginalization/
[8] http://educationenvoy.org/child_labour_and_education_UK.pdf

Of course, equity-based targets will not be universally popular with governments. Then again, the ultimate litmus test of the post-2015 framework is not whether it assuages governmental sensibilities. As Gandhi would have agreed, the ultimate test is whether or not it delivers something useful for the poorest and most marginalised people.

A DATA REVOLUTION TO MATCH THE AMBITION
OF 'LEAVING NO ONE BEHIND'

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If we are going to 'get to zero' (Save the Children, 2013), we need a 'data revolution'[9] that permits us to assess progress in the circumstances of disadvantaged and marginalized groups, whatever their size. Often these groups are harder to reach and/or discriminated against, and therefore not enjoying average societal progress. To inform decisions, countries need data that can be, as the High-level Panel on Post-2015 highlighted, "disaggregated by gender, geography, income, disability, and other categories, to make sure that no group is being left behind" (United Nations, 2013). Current data only partially allows such assessment. If we are serious about this challenge, we need to collect data that allows identification of groups based on gender, age, disability status, location, ethnicity or class and on combinations of these (e.g., children with disabilities, or older people who are ethnic minorities). We need a real data revolution that matches the level of our ambition.

Household surveys have been the workhorse of data collection efforts to monitor the Millennium Development Goals (MDGs) and this is likely to continue under a new set of global goals (Samman, 2013). But they are insufficient to collect enough granular and timely data on the circumstances of disadvantaged and marginalized groups.

Why is this so challenging?

- ✓ Disaggregation is constrained by group size: Take the Demographic Health Survey (DHS),[10] one of the international survey programs frequently used to monitor MDG progress worldwide. The sample for the DHS 2011 from Nepal consisted of an impressive 11,000 households containing over 47,000 people. Suppose we want to

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monitor malnutrition among children under five from rural areas in the Far-Western region: our sample size falls to 751 individuals. If we wanted to track performance among boys and girls, we are left with subsamples of about half that number – enough to be statistically representative, but with a relatively large error. If we want to add any additional filter – say smaller geographical regions or socioeconomic groups – our samples dwindle to such small sizes that it becomes very challenging to make any reliable inferences. Increasing sample sizes may be possible, in some cases – but the larger the sample, the more costly and difficult it becomes to secure high quality data. Pooling data across time is one possibility – but still rife with problems – it was estimated to take at least 8 years of survey data to obtain reportable estimates for some population subgroups in the US National Health Interview Survey (Seid et al 2006).[11] An alternative is to use census data – but these are only produced every decade, therefore inadequate for monitoring.

- ✓ Questionnaire space is limited: The problem is not only the representativeness and frequency of data; household surveys often do not register all the information needed for disaggregation. For example, DHS provides abundant information on health but does not capture information on income or consumption owing to length limitations; rather it provides a rough and ready wealth index[12] based on asset ownership. In contrast, the World Bank's Living Standard Measurement Surveys[13] measures income and consumption comprehensively, but at the expense of detailed information on other dimensions. Some characteristics are also difficult to measure, such as ethnicity or disability. Short modules may provide a useful way of identifying particular groups –for example, the Washington Group's short disability module[14] or the experience of Brazil in measuring ethnicity in household surveys (see Peggy at al 1998; Travassos and David 2004), but survey designers still need to make difficult choices about what to include.

- ✓ Oversampling particular groups is costly – and the costs are higher, the smaller the group in question. This too can lead to difficult choices. For example, white minorities were not included in the 'ethnic boost' sample in the UK Understanding Society survey that began in 2009 (Berthoud et al 2009).

How could the data revolution help?

There is certainly a need to adjust standard household surveys, for instance, to offer new short modules, to ask more questions of people other than the household head, and to oversample certain population groups in conventional ways.[15] But household surveys cannot be all things to all people – if we add too many new elements, then we risk making them very blunt instruments – it becomes too costly to collect and data quality suffers.

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[11] National Health Interview Survey <http://www.cdc.gov/nchs/nhis.htm>
[12] Wealth Index: http://dhsprogram.com/topics/Wealth-Index.cfm
[13] Living Standard Measurement Surveys: http://go.worldbank.org/IPLXWMCNJ0
[14] Washington Group's short disability module: http://www.cdc.gov/nchs/data/washington_group/WG_Short_Measure_on_Disability.pdf
[15] For examples relating to old age, disability and mental health, see Samman and Rodriguez-Takeuchi 2013.

We need to start thinking how to galvanize the collection of disaggregated data in light of the opportunities before us. Official statistics have their place – but increasingly, the distinction is not so much between official and unofficial data as between good and bad information, as Enrico Giovannini has noted.[16] Possibilities include improving and expanding existing data sources and crucially, facilitating linkages between different types of data to capitalize on their value.

More data could be obtained from existing and emerging sources, for example:

✓ Exploiting the potential afforded by community-based mechanisms (World Vision 2014) – for example, community score cards (CARE Malawi 2013), community based monitoring systems,[17] and other forms of locally grounded and granular reporting.[18]

✓ Using mobile technology to oversample small groups. The potential of mobile technology to enable people to report on their own experiences across a range of contexts – ranging from humanitarian relief situations (NOMAD 2011) to outbreaks of political violence – and in countries as diverse as Uganda[19], Brazil[20] and Haiti[21] is particularly exciting.

There is a need to explore further how these two approaches could complement household surveys in methodologically robust ways. Such approaches have the added transformative potential of making people agents of data collection themselves and enabling them to hold governments and others to account, though they need to be articulated with mechanisms to monitor responses to such initiatives.

At a systems level, promising directions for improving and linking data include:

✓ Renewed emphasis on building civil registration and vital statistics (CRVS) systems (World Bank and WHO 2014), and on linking administrative registries with household surveys – as in recent UK experiments (Jenkins et al 2008). To protect anonymity and facilitate the task in contexts with more complex residential address systems, linking using small areas or groups might be most fruitful.

✓ Exploring the potential of Big Data. Data collected from such diverse sources as call data records, satellite imagery and other varied sources holds promise – as in Abidjan, where call data records led to detailed maps of poverty (Smith et al 2013) and of migration patterns (Palchykov et al 2014). Such technologies could yield measures of material wellbeing in small localities at a high frequency and low cost, but so far, the

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[16] http://www.ecb.europa.eu/events/pdf/conferences/eastats4/giovannini.pdf.
[17] Community Based Monitoring System: http://www.pep-net.org/programs/cbms-community-based-monitoring-systems/about-cbms/
[18] See for example: http://www.citizenreportcard.com/
[19] See: http://www.ureport.ug/
[20] See: http://rio.unicef-gis.org/
[21] See for example: http://www.ushahidi.com/mission/

focus has been on monetary indicators and on the movement of people, and only spatial disaggregation is feasible.

If we find a way to make these connections effectively, then we can maximize the potential of the data revolution to advance an equity based agenda – otherwise, we risk of working in silos and not capitalizing on the full range of possibilities now open to us. In the worst scenario we may duplicate effort and waste resources without enough results.

Of course such initiatives are not from problems. Challenges are technical, ethnical and financial, but also political – posed by conflicting interest groups, questions around who is collecting what and why, and how should all these pieces of the puzzle fit together (and indeed, should they). Authorities may resist collecting data on particular groups – in 2011, India counted caste in its census for the first time since 1931[22] – while social stigma may render certain groups invisible. Many people have legitimate concerns about privacy. And some groups may have more access to new technologies,[23] and more interest in reporting on their circumstances, than others. Nonetheless, we need to accept the scale of the challenge and be ambitious in our thinking.

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[22] http://www.bbc.co.uk/news/world-south-asia-10949177
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