



ESSAYS ON INEQUALITY AND INTEGRATION

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Content

Introduction	7
<i>Axel Franzen, Ben Jann, Christian Joppke, Eric Widmer</i>	

Part I

Integration and Social Policy **15**

The Levels of Social Integration. Analyzing Inequalities from a Social Bonds Perspective	17
<i>Serge Paugam</i>	

Willkommenskultur und zivile Integration auf dem Prüfstand: Schweizer und Deutsche Ansätze im Vergleich	46
<i>Tobias G. Eule</i>	

Social Policy's Middle Way: Housing Cooperatives and Inclusionary Zoning	66
<i>Debra Hevenstone</i>	

Part II

Changing Inequalities **91**

The Global Diffusion of Inequality since 1970	93
<i>Salvatore Babones</i>	

Materielle Ungleichheit in der Schweiz im Wandel der Zeit	116
<i>Oliver Hümbelin und Rudolf Farys</i>	

Considering the Various Data Sources, Survey Types and Indicators: To What Extent Do Conclusions Regarding Changing Income Inequality in Switzerland Since the Early 1990s Converge?	153
<i>Christian Suter, Ursina Kuhn, Pascale Gazareth, Eric Crettaz, and Laura Ravazzini</i>	

Wandel der Berufsstruktur in Westeuropa seit 1990: Polarisierung oder Aufwertung?	184
<i>Daniel Oesch</i>	

Part III	
Inequality, Fairness and Environmental Justice	211
Relative Frustration und das Tocqueville-Paradox: Boudons spieltheoretisches Wettbewerbsmodell und experimentelle Evidenz <i>Joël Berger und Andreas Diekmann</i>	213
The Nature of Fairness in Dictator and Ultimatum Games <i>Sonja Pointner and Axel Franzen</i>	232
When Environmental Inequality is Unjust <i>Anton Leist</i>	253
Editors and Authors / Herausgeber und Autor_innen	276

Introduction

Axel Franzen, Ben Jann, Christian Joppke, Eric Widmer

Since Karl Marx first described the enormous social inequalities and their potential for social change at the beginning of industrialization in the 19th century, the origins, extent, and consequences of social inequality, as well as the level of inequality which a society is willing to tolerate, have been major themes in sociology. Our discipline has taken on the theme of inequality in multiple areas ranging from research on unequal educational and labor market opportunities, unequal income distributions, gender and health inequality, and inequality in life expectancy, to mention only a few.

The economic crisis at the start of the 21st century underlines the fact that the theme of inequality has not lost its relevance. Above all, the European debt crisis inclines us to suspect that social inequality is growing. In comparison with economic boom times, almost all the European countries feel the pressure of stabilizing their economies and cutting back on public expenditures. This impacts redistributive policies and raises new challenges for integration policies addressing the emerging disparities. At the same time as inequalities within European societies are exacerbated, disparities between states are also rising, which will likely have adverse effects on European unification, not to mention creating new challenges for Switzerland as well.

The European debt crisis came at a point in time when global environmental and demographic problems worsened simultaneously. The unequal impact of climate change and the unequal distribution of population growth will lead to an increase in migration and elevate the immigration pressure on the European Union and Switzerland. For this reason, Switzerland, as well as the other European countries, grapple with questions of managing migration and integration. However, inequalities – as problematic they may be – are also in some sense an opportunity. They increase the diversity of society and can bring about new ideas, innovation, and growth. Our desire and ability for social integration depends, above all, on the ultimate balance between these advantages and disadvantages.

The chapters in the present volume concentrate on the opportunities as well as the risks associated with these social changes from various angles.

They are a handpicked set of outstanding contributions from the Congress of the Swiss Sociological Association that took place at the University of Bern, June 26–28, 2013.

Inequality and integration have been two opposite paradigm-setters of sociology since the classics. Marx and his followers were betting on the conflicts and fractures brought about by inequality-ridden capitalist economies, while Durkheim created an opposite line of musing how societies cohered through shared norms and values, even under conditions of functional differentiation. Sociology's inequality-integration schism has not been conducive to an understanding of either side of things. As *Serge Paugam* points out in his contribution to this volume, some recent hybrid fields of sociology, such as migration or gender studies, have ventured, however cautious and under-theorized, empirical rapprochements between both traditions, the one beholden to stratification and conflict, and the other to norms and cohesion. To merge both paradigms at conceptual level, in terms of "unequal integration," is the ambition of Paugam's "social bonds perspective" presented in his chapter. Social bonds bring material and symbolic rewards, "protection" and "recognition," allowing people to both "count on" and to "count for," in his felicitous phrase. But social bonds are not of one kind, cutting deeper and wider than the network ties that have become so fashionable in recent decades. Paugam distinguishes between the "lineal" bonds of biological or adopted family, the "elective participation" bonds of friendship, neighborhood, or associational life, the "organic participation" bond of work and professional life, and the "citizenship" bonds of nationality and membership in the nation-state. Any of these bonds can be ruptured (even the biologically based parent-child relationship), and send out ripple effects to the other bonds, in the extreme, exposing the individual to what contemporaneously is referred to as "precarity". The most precarious in our urban world, the homeless, are often those who never had intact families to start out, so that the denial of the earliest and most elementary of social bonds, the biological parent-child relationship, has vitiated other protections and recognitions later in life. The homeless, at the lowest end of the inequality ladder, also exhibit the lowest level of integration, what Paugam calls "marginalized integration." In this case, there is not only uncertainty about the integrity of certain bonds (as in "weakened integration") or the breakdown of one of the bonds (as in "compensated integration"), but instead the "cumulative breakdown" of all bonds, disempowering the individual even to "resist" and instead leaving her only with a bare "survival" response.

Migration is a domain where the need for a Paugamian "unequal integration" paradigm, that would simultaneously capture inequality and integration, is

particularly obvious. In fact, the current public discourse about “integration” is almost entirely about immigrants and their alleged deficits in this respect, and it is also obvious that this integration deficit comes with considerable inequalities (of jobs, education, and life chances). This is a rather different perspective on integration than the one offered by the Durkheimians, which was about the integration of a functionally differentiated society as a whole. Instead, immigrant integration is about a second aspect of integration, which is how individuals and groups integrate into a ready-made society. A specificity of European states is to steer the process of integration thus understood through so-called “civic integration” policies, which are the subject of *Tobias Eule’s* chapter. Civic integration, the obliging of newcomers to language and civic knowledge acquisition, is often framed as departure from a previous approach of “multiculturalism,” which has more often been a groupist *laissez-faire* in matters of immigrant integration than an explicit policy (of the kind one would find in Canada or Australia). Civic integration comes in a neoliberal, or rather illiberal key, as it signals a “shift in the obligation to integration toward the individual migrant”, as Eule puts it. This is expressed in the ambiguous logo of “supporting” (*fördern*) and “demanding” (*fordern*) integration at the same time, which characterizes the German and Swiss integration policies. However, in one-sidedly burdening the immigrant with the integration effort, in the Netherlands even obliging him or her to pay in full for integration courses, European states are only using a policy strategy for immigrants that have already been used elsewhere in the context of “New Public Management” and devolved welfare states, with markets taking over functions that previously had been exercised by states. Even when a polite *Willkommenskultur* is put on by the diminished neoliberal state, Eule grimly concludes that “selection, not integration, seems to be the dominant logic of this migration policy.”

Debra Hevenstone tackles a pivotal aspect of “unequal integration” for all, which may have more debilitating effects than most others: housing. More precisely, she looks at integration-undermining inequities in housing that are to be combated by low-income housing policies. Take away the roof above your head and you’re literally out, in the streets, in the process depriving you of all the other bonds too that keep you from the abyss. Accordingly, even in America’s anti-statist market society the state has intervened in correcting “market imbalances” and “residential segregation” that go along with peoples’ differential capaciousness to procure adequate roofs. Hevenstone distinguishes between four waves of social policy for low-income housing, in the course of which, however, the market has become ever more determinative. The invention of “public housing” in wave 1 was in the aftermath of the Great

Depression, the mid-1930s, to prevent evictions and foreclosures. However, this solution became quickly mired through creating poverty pockets and urban segregation, spatially locking out the poor from mainstream society. In response, “integration” and residential mixing become the new watchwords, along with granting more choice to individuals in the distribution of habitats. Wave 2 thus saw demand-side subsidies or “vouchers,” which replaced traditional public housing complexes by the 2000s. The attractiveness of vouchers is to be more “market-friendly,” thus resonating with a diminishing state in a neoliberal age. Conversely, however, being in-kind rather than in cash, vouchers are often experienced as stigmatizing and landlords may be reluctant to rent out their property on this basis. In Wave 3, yet more market-friendliness kicks in, in terms of subsidies to developers through tax credit programs – that is more filling developers’ pockets than create low-income housing, as Hevenstone skeptically remarks. This approach tends to be accompanied by “inclusionary zoning policies,” as for instance in New York since the 2010’s, in which financial incentives for developers are provided to lodge the poor “in the exact same apartment just down the hall,” as Hevenstone writes. This may be the apex of residential mixing, and thus integration. Yet it comes at the cost of feeding jealousy among the better-heeded, who may pay double or more for the same amenity just next door. The “path not taken” in social housing are cooperatives. Unsurprisingly, they never took off in the US because of their reputation not to be “market friendly,” but they are widely known in Europe (like in Zurich, where no less than 20 percent of all apartments are owned by cooperatives). Hevenstone retells the evolution of social housing policies as an irony. This is because a mechanism of market correction, over time, has taken on ever more the spirit of the market. Not unlike Eule’s, and to a degree Paugam’s, Hevenstone’s story eerily demonstrates the decreased state capacity in our time. The diminished state comes at an obvious price: more inequality and less integration.

The contribution of *Salvatore Babones* is concerned with the core theme of this book: The question of why income inequality has been rising in most countries during the last several decades. Babones questions the standard explanation in most textbooks and expressed by many economists in academic and public discussions, that inequality is a consequence of globalization, skill-based technological change, and the decrease in agriculture. Instead Babones suggests that the rise in inequality started in the United States in the 1970s as a consequence of purposeful decision of key political figures of the political system in response to the leftist movement of the 1960s. A prominent example is former US Supreme Court justice Lewis F. Powell, Jr. who warned the US Chamber of Commerce in the so-called “Powell Memo,” that the American

economic system is under attack and should be defended, particularly by business friendly economists and business departments in universities. Many of these ideas were later implemented under the presidency of Ronald Reagan in the 1980s. Babones argues that inequality diffused starting with American policies and later spreading to other countries: First, other rich countries, like in the United Kingdom under Margaret Thatcher, copied American policies. Second, other poorer nations were more or less coerced by international organizations (e.g. IMF) that were, in turn, pressured by the US. The chapter by Salvatore Babones might appear radical, but it is definitely a very well written and thought provoking essay. Babones' insightful and knowledgeable writing is a strong reminder that history is not only driven by abstract social forces but sometimes also by influential individuals and groups.

The degree to which Switzerland has been affected by the global trend towards increasing inequality is controversial in the existing literature. After providing a review of relevant micro and macro processes, *Oliver Hümbelin* and *Rudolf Farys* address the issue by presenting empirical results from an analysis of the development and structure of income and wealth inequality in Switzerland based on tax data. Hümbelin and Farys demonstrate that income inequality indeed increased considerably since 1950 in Switzerland. Furthermore, Swiss wealth inequality appears to be extremely high in international comparison and a further moderate increase can be observed over the last decades. For income, several cycles of increasing and decreasing inequality can be identified in the data that seem to be related to macroeconomic cycles (with increasing inequality in times of economic growth and moderating effects of economic downturns) and to the expansion of the welfare state. Finally, Hümbelin and Farys shed light on regional disparities and the relevance of tax competition by analyzing the development of income inequality at the cantonal level. The chapter by Hümbelin and Farys is a timely and invaluable contribution to Swiss inequality research. Their results leave little doubt that Switzerland did not manage to escape the recent trend of rising inequalities and that tax competition is a driving force restructuring Swiss inequality.

The analysis of Hümbelin and Farys is complemented by the chapter of *Christian Suter*, *Ursina Kuhn*, *Pascale Gazareth*, *Eric Crettaz*, and *Laura Ravazzini*, who provide a detailed account of the development of income inequality in Switzerland since 1990 using various data sources, inequality measures, and income definitions. The results by Suter et al. illustrate that the measured levels of inequality strongly depend on data source (e.g., higher inequality levels using tax-based data than survey data). Yet, at least for household income, a more or less consistent picture with respect to the development of inequality over time emerges. Similar to Hümbelin and Farys,

Suter et al. find that income inequality is linked to the business cycle with increasing inequality during economic upswings and stable or decreasing inequality during recessions. For individual earnings, results are less consistent. But the highest quality earnings data do indicate an increase in inequality due to stagnating wages at the bottom of the distribution and, in particular, due to fast-growing wages at the top. Although, overall, conclusions from the results of Suter et al. are similar to the findings by Hümbelin and Farys, the chapter of Suter et al. provides many additional insights. Moreover, Suter et al. demonstrate that relying on a single data source may lead to premature conclusions and that employing just a single inequality measure or income definition may not do justice to the complexity of inequality in Switzerland.

A different empirical perspective on the development of inequality in Switzerland and other European countries is presented in the chapter by *Daniel Oesch*. Oesch analyzes the changes in occupational structures since 1990 based on data from labor market surveys. Existing results for the USA point to a strong polarization of the labor market and a hollowing of the middle class, but the results provided by Oesch do not support such a conclusion for Switzerland or other European countries. There has been a strong expansion of employment in well-paid occupations in management and among professionals, but the results strongly speak for a general upgrading of the occupational structure and provide only weak evidence of polarization. Furthermore, the structural upgrading did not contribute to rising unemployment as it was counterbalanced by educational expansion and an increasing supply of skilled labor. Based on his results Oesch also concludes that investments in higher education and vocational training are better policies to increase employment than trying to expand the low-wage sector.

Joël Berger and *Andreas Diekmann* approach the topic of inequality and social mobility from a game-theoretic perspective. In their contribution they investigate the Tocqueville Paradox. The paradox, named after the French political scientist, refers to the observation that the degree of dissatisfaction among members of a society with the political system often increases after periods of reforms. A similar phenomenon is also described in “The American Soldier”, Stouffer et al.’s famous study about the satisfaction of members of a military unit with the chances to receive a promotion. Paradoxically, the general satisfaction level was lowest in units with the highest promotion rate. Following Boudon, Berger and Diekmann formulate a game theoretical model in which a group of individuals compete for a limited number of positions. The assumption is that those who invest in the competition for the promotion incur costs. Actors are happy if they succeed and receive promotion, since the benefits of the promotion are larger than the investment costs. However,

those who invest and do not succeed are frustrated since the investment costs are lost. The crucial assumption of the model is that the number of individuals who decide to invest increases with the number of available positions and with the benefits of promotion. If the number of competitors increases over and above the number of available positions the number of unsuccessful individuals increases as well and might exceed the number of successful actors. Hence, the competition can produce more frustrated than successful individuals. Berger and Diekmann's model predicts an inverse u-shaped relationship between promotion chances and frustration levels. The authors test their model experimentally. The experiment does not produce all of the predicted results but it very nicely demonstrates the trade-off between promotion chances and inequality of a social system. Put differently, low social mobility goes hand in hand with low inequality, as does high social mobility. But the level of inequality rises as social mobility increases to intermediate levels. Of course, there is no straightforward remedy to how societies should deal with this trade off. But a clear formulation of the problem increases the understanding of it, and clarifies the choices societies face.

Sonja Pointner and *Axel Franzen* also employ a game-theoretic approach in their contribution. They study social norms of fairness and reciprocity, as such norms can be seen as basic building blocks for the integration of societies and the emergence of social order. On the one hand, Franzen and Pointner present experimental results from the so-called dictator game under varying anonymity conditions. Their results indicate that subjects behave in a narrow self-serving way once complete anonymity is guaranteed and the subjects no longer have an opportunity to signal fairness through their behavior. This casts doubt on recent claims from behavioral economics that humans act on the basis of truly other-regarding motives. On the other hand, Franzen and Pointner evaluate the existence of altruistic punishment in the so-called ultimatum game. In contrast to the first experiment they find that subjects are willing to engage in costly punishment, even if full anonymity is ensured. Taken together the results by Franzen and Pointner indicate that humans are happy to treat others unfairly "if they see the chance of getting away with it," but that they are, at the same time, emotionally opposed against being treated unfairly. Hence, at least according to the results of this study, the fundamental mechanism that fosters social order is based on emotional and potentially self-destructive reactions to unfair treatment (and the others' expectations of such reactions), but not on truly pro-social behavior.

Anton Leist shifts the focus of inequality to the relatively new aspect of the unequal distribution of risks that originate from environmental pollution and destruction. His contribution is a philosophical discussion about

the meaning and the definition of the concept of “environmental justice,” a term that was introduced into the literature about forty years ago and has become increasingly important as environmental problems, and particular global warming, have increased. Despite its increasing popularity and use the definition of “environmental justice,” is not clear at all and discussions about it suffer from misconceptions and misunderstandings. The contribution of Anton Leist intends to shed some light on the meaning of the concept and the moral principles it embraces. Particularly, Leist makes four points: First, environmental justice is different from environmental inequality. Second, the term “environmental justice” should be distinguished from the term “ecological justice.” Third, concepts of justice are based on general principles and they should also be made explicit with respect to environmental justice. Forth, there are differences between social and environmental inequalities. Leist suggests that issues of environmental justice should be discussed from the perspective of “placement-justice.” This principle requires that environmental burdens should be compared and counterbalanced with the advantages that arise from the production of goods that cause the problems. Hence, an equal distribution of environmental burdens is not necessarily also just. Rather environmental justice requires that beneficiaries also share larger burdens and that the disadvantaged should be compensated. Leist demonstrates the consequences of the principle by applying it to several examples such as the exposure to air pollution, waste sites, flood vulnerability, and green space.

Part I

Integration and
Social Policy

The Levels of Social Integration. Analyzing Inequalities from a Social Bonds Perspective

Serge Paugam

The notion of integration is pervasive in contemporary social and political debate. It generally appears with reference to particular public policies directly targeting the immigrant population or other individuals in the margins of the social system. Implying the existence of a problem – the lack of integration of certain groups – and an intention to find a remedy to the problem, integration is also a political issue. However, this notion also applies to the social sciences and cannot be reduced to themes of immigration and national identity, or to policies addressing these former. Within the tradition of social sciences, the notion of integration is readily associated with Durkheim. In this acceptance, integration denotes a larger process applying to the social system as a whole. Consequently, both the integration of individuals *into* society as well as the integration *of* a given society as a whole are taken into consideration. Following the analysis of the founder of French sociology, a modern society is integrated when it is organized according to the principle of organic solidarity. By titling this article *The Levels of Social Integration*, I wish to undertake an analysis of the failures of the contemporary system of social integration as well as the production of inequalities. While keeping within the Durkheimian tradition, I seek to explain – beyond what Durkheim himself had undoubtedly planned to examine – the unequal foundations of social integration and the limits to the regulation of these very inequalities. This article posits that not only are economic and cultural capital unevenly distributed among individuals, but that the ties that bind individuals to groups and to society are themselves of unequal in strength and intensity.

The hypothesis of unequal integration has already been the object of empirical analyses in social sciences, notable of the research work realized by Maurice Halbwachs (2011) on the working classes in the beginning of the 20th century. Accounting for a certain hierarchy of living standards, this disciple of Durkheim used the image of a campfire around which individuals were gathered in concentric circles corresponding to their respective class po-

sitions. In the center one finds the hearth, representing the highest intensity of social life, and around which the most integrated classes are concentrated. The working classes, the least integrated and the most intimately connected to life's material aspect, find themselves at the furthest peripheries. This campfire metaphor provides a heuristically fertile representation of a stratified model of social integration already analyzed by Halbwachs (Paugam 2007). Although the concentric circles do not directly correspond to the levels of integration that I would like to discuss here, the idea is quite similar as in both cases, social integration is perceived as an unequal process.

In this article, I will attempt 1) to demonstrate what can be gained from combining the Durkheimian approach of social integration with that of social inequalities; 2) to present a framework for undertaking this conjoint analysis – namely that provided by the theory of social bonds; 3) to outline a typology of levels of social integration drawing to recent sociological studies.

1 Integration and inequalities: combining key sociological perspectives

Establishing a dialogue between the notions of integration and inequalities presents a major challenge for sociologists. These two issues belong to different sociological paradigms and traditions, which are often perceived as incompatible. While sociologists working on questions of integration are sensitive to the social bond, those who examine inequalities generally focus on a theory of social stratification, and consequently on social divisions. Some scholars analyze what holds a society together and facilitates cohesion despite social differentiation; others study what divides individuals beyond their membership in the same society. From the outset, the objects of study are thus different. Analyzing what unites and integrates immediately places the researcher in the perspective of modes of socialization expected to transmit to individuals a certain moral order and a normative framework for their integration. On the contrary, analyzing what divides people and pits them against each other leads the researcher to postulate that social norms are not homogeneous, that they are rooted – at least partially – in inequalities of social status and position, and that they may give rise to forms of domination and conflict. Much of sociological debate has fallen within one of these two founding paradigms, but rarely have they involved both paradigms. This is primarily because they oppose – put somewhat simply – the functionalist and the Marxist tradition in terms of which many sociologists continue to identify themselves.

It must be noted that sociologists specializing in the theme of integration are often quite cautious when addressing inequality, and inversely, sociologists examining inequality have little incentive to reflect upon integration. Let us consider for example two significant books published in France in the early 1990s. In «*La France de l'intégration*», Dominique Schnapper (1991) addresses integration as an idealistic notion and explores how social norms are negotiated. While the idea of a single model is rejected from the outset, the analysis focuses on the different forms that the integration process can take in modern society based on what the author refers to as «révolutions tranquilles» (“silent revolutions”) that have affected major social institutions and even interpersonal relationships. The book had a significant impact on French sociology and facilitated the renewal of the sociological study of the Nation, although it only indirectly addressed the issue of inequalities. The integration of individuals *into* the social system is thought to be an implicit translation of the integration *of* the social system itself conformingly with the Durkheimian perspective. However, the approach is blind to the institutional production of a hierarchical order perpetuating traditional forms of inequalities, as well as to a comprehensive analysis of the disintegration of these institutions as new inequalities emerge.

In «*La misère du monde*», published two years later, Pierre Bourdieu and his team (1993) draw to data obtained through in-depth interviewing, and analyze forms of social suffering among individuals from different social classes having in common the painful experience of an inferior social status in their daily life. The authors define this as misery of position, and distinguish it from misery of condition. This collective book falls within the tradition of the study of class inequalities, faithfully using the concepts of *field* and *habitus* coined by Pierre Bourdieu in the early 1960s. However, the authors barely address the question of social integration. The explanation of social suffering is primarily sought in the traditional forms of domination rather than in the structural transformation of the norms governing the process of social integration itself. Hence, what lies at the heart of the Durkheimian interpretation of social unrest – and more generally, of social dysfunction – is not directly addressed.

These two examples are emblematic of challenges in simultaneously studying integration and inequality. Nevertheless, one should not assume that these two theoretical perspectives have never been the subject of conjoint analysis within contemporary sociology. Although such tendency is still in its early stages, one can detect a progressive convergence of these two approaches. Moreover, the rapprochement concerns most key fields of sociological research.

Today, for example, scholars in the field of sociology of immigration – traditionally falling within the integration paradigm – are directly tackling questions of stigmatization and discrimination, and thus placing themselves closer to the tradition of studies of social inequalities (Safi 2012). They are no longer simply treating an issue of either levels or forms of integration, but rather of persistent barriers to integration. The explanation of problems of integration is no longer simply sought in intrinsic difficulties the immigrant population has with regard to the social norms of their country of settlement, but in the way the very institutions expected to enhance integration function – or rather – dysfunction.

Having experienced significant growth over the last twenty years, sociology of gender also partially reflects the rapprochement of the two traditions. Indeed, it often proposes a new take on the analysis of male domination by relating this to how institutions function, as well as to the overall social norms underlying the system of social integration and the position of men and women within it. Sociologists specializing in gender issues often take as their starting point the current welfare regimes when explaining why gender inequalities are upheld in modern societies, and have underscored the notable absence of the gender issue in Esping-Andersen's (1990) initial studies, leading the latter to complete his interpretative framework with regard to this fundamental criticism. Sociologists of gender also take discrimination into account, and notably with regard to studies on hiring and the forms of remuneration in the labor market (Laufer et al. 2003).

Sociology of ages, and that of generations, has also focused on the forms of inequality – having gone unnoticed until recently (Chauvel 1999) – by examining them in the light of how institutions function. Observing “sacrificed generations” has led to the re-examination of the integration system itself by highlighting the social logics which result in a highly unequal repartition of chances for success and access to well-being among generations. For its part, sociology of education has achieved gradual metamorphosis by including studies on educational inequalities within a broader analysis of the social conditions of reproduction. It has focused on how educational institutions function (Duru-Bellat 2007), how schools are integrated into neighborhoods (Van Zanten 2001), and has directly centered on the question of social inequalities (Millet and Thin 2005) as well; all these approaches have underscored, beyond differences in social class, the specific impact of the breakdown of the social system on inequalities.

Traditionally rooted in the analysis of inequalities related to income levels and living conditions, sociology of poverty has, as of the 1990s, also renewed its theoretical approach by taking into account the degradation of

the wage-labour condition, the increase in the population on welfare, and by examining questions related to social integration. Poverty has thus been analyzed in terms of the interdependency between the category of the “poor” and the rest of society. The concepts of social disqualification (Paugam 1991) and disaffiliation (Castel 1995) express the effort to associate integration and inequality. Moreover, the increasingly precarious relations to work and employment has led to the seeking of new forms of professional integration – beyond explanations based on divisions usually existing between professions and socio-professional categories – and to taking up anew the Durkheimian analysis of the division of labor (Paugam 2000).

Lastly, without claiming to be exhaustive, it is also worth noting that urban sociology – largely influenced by the Marxist tradition during the 1960s and the 1970s – has progressively raised the issue of social diversity and of urban social bonds without totally relinquishing its areas of specialization such as segregation. It has thereby also responded to the expectations of the developers of urban social policies and urban renovation (Donzelot 2003).

All these studies are based on the observation that the withering of traditional mechanisms of social integration, defined on the basis of the strength of major social institutions (family, school, employment, intermediary structures, public institutions) (Dubet 2002), results in the emergence of new social inequalities, which appear to be amplified by the current crisis periods. These new inequalities complement and complicate the traditional ones that sociologists have studied over time through the analysis of social stratification and social classes. Building on these studies, *Unequal integration*, thus intends to facilitate our understanding of the logics of the production of contemporary inequalities.

2 The theory of social bonds as an analytical framework

To study the unequal forms of social integration, I propose to begin by considering the different types of social bonds. Each type of social bond can be defined on the basis of two dimensions: protection and recognition. Although the bonds are multiple and different, they all bring the individual both the protection and recognition necessary for their social existence (Paugam 2008, 2014). Protection refers to all the materials (family, community, professional, social) that an individual can draw to when facing difficulties in life, and recognition refers to the social interaction that stimulates the individual by providing evidence of her existence and of her value in the eyes of the

other. The expression “*to count on*” sums up quite well what the individual can expect from her relationship with others and institutions with regard to protection, while the term “*to count for*” expresses the expectation, which is just as vital, of recognition. The emotional attachment to a “we” is all the more stronger if the “we” corresponds to an entity – concrete or abstract – *on* and *for* which individuals know they can count. It is in this sense that the “we” completes the “me”. The bonds that provide an individual with protection and recognition therefore assume an affective dimension that reinforces human interdependence.

As an extension of this preliminary definition, four major types of social bonds can be distinguished: *lineal bond*, *elective participation bond*, *organic participation bond*, *citizenship bond*.

The *lineal bond* takes two forms. The first one refers to consanguinity, that is, to the “natural” line of descent based on the proof of sexual relations between the father and the mother, and on the recognition of a biological relationship between the child and her parents. We start from the premise that each individual is born into a family and meets – in principle – at birth both her father and mother as well as the extended family to which she inevitably belongs and which she has not chosen herself. However, we should not overlook the case of adoptive filiation, recognized by the Civil Code and distinct from relations forged in the context of a foster family. Adoptive filiation is hence a form of social filiation. Generally speaking, it should be noted that biological and adoptive filiation both function as the genuine foundations of social belonging. It is also worth noting that following the principle of consanguinity, in France, children have the right to inherit from their parents, but also have a legal obligation to care and provide for their parents. Beyond the legal issues around the definition of the lineal bond, sociologists, psychologists, social psychologists and psychoanalysts place emphasis on the socializing and identity-building function of this very bond; it contributes to the individual’s equilibrium from birth, ensuring both protection and recognition, physical care and emotional security.

As we see, the lineal bond is structured by specific social norms. It facilitates the integration of individuals into the social system. However, the intensity of this bond is highly unequal among individuals. First, a premature breakdown of the bond may occur. A mother who feels unable to care for and raise her child could decide to give up the baby by giving birth anonymously. Parents can lose their parental authority and, through a court decision, have their children withdrawn and placed in specialized education institutions or foster families. This withdrawal does not imply a complete breach of the lineal bond but leads to the disqualification of the parents to a lesser or greater degree,

and it may be more difficult for the children to grow attached to them. For instance, some foster children refuse to see their parents once withdrawal from the latter has taken place. A breakdown of the lineal bond also occurs upon the death of one's parents. The aforementioned examples refer to situations that make relations between parents and children impossible, episodic or unlikely. In some other cases, the breakdown is not formal, for example when a child continues to live with her parents but experiences abuse, harassment and rejection. This implies a lack of recognition on the part of the parents, which generally leaves deep and lasting psychological damage in children. Also, the lineal bond can be breached in the adulthood. This could happen as a result of an unfortunate incident provoking mutual misunderstanding or disagreement. Although the line of descent does not come to an end, the bond is no longer actively maintained. Parents and children withdraw into themselves and expect neither protection nor recognition from the relationship. In a recent survey carried out in the Paris metropolitan area, we found that the number of people with no relationship or practically no relationship with their father or mother, even though these are still alive, was over 20 % in the working class (27.9 % for the father, 21.3 % for the mother), that the percentage regularly decreased as we moved up along the social ladder, and that this was the case of only less than 5 % of the respondents belonging to the highest socio-professional category (4.3 % for the father and 3.6 % for the mother) (see table 1). Although the breakdown of the lineal bond seems to follow a clear class-based pattern, this inequality is often ignored.

Table 1: Lack of relationship with parents by socio-professional category

Socio-professional category	Never meet, or rarely meet their father	Never meet, or rarely meet their mother
Higher-grade professionals, managers, intellectual professionals	4,3	3,6
Petty bourgeoisie, artisans, traders, business leaders	6,4	12,5
Lower-grade professionals	8,7	7,0
Routine non-manual workers, employees	18,5	10,4
Workers	27,9	21,3
All	12,1	8,8
Chi ²	p < .0001	p < .0001

Source: SIRS Cohort, 2010. Exploitation Serge Paugam and Marion Selz.
N = 3020 individuals.

The formation of the *elective participation bond* takes place in the context of extra familial socialization during which the individual comes into contact with and learns to know others through participation in various groups and institutions. The socialization itself takes place in numerous places: neighborhoods, gangs, groups of friends, local communities, and religious, recreational and cultural institutions. During this process of social learning, individuals are at once compelled by the necessity to integrate themselves into groups and institutions, and autonomous insofar as they can assemble their own social networks in which they can affirm their personality. Our analysis of this bond does not share the insight of the argument that social integration in modern societies is based on a multiplicity of elective memberships or on a process of positive disaffiliation (Singly 2003). It is furthermore necessary to distinguish the *elective participation bond* from other types of social bonds by highlighting its specificity, i.e. its elective character, which enables individuals to freely establish interpersonal relationships depending on their desires, aspirations and emotional valence. This bond can refer to a plethora of forms of elective attachment. The formation of a partnership is one of them: the individual becomes a member of a new family network and her circle of belonging widens. While there is no freedom of choice in the *lineal bond*, individuals have autonomy in the *elective participation bond*. Nevertheless, this autonomy is controlled by a series of social determinations. Moreover, the marital relationship is like a game of mirrors. Besides the protecting function that it provides to both partners – each partner being able to count on the other – the function of recognition can be understood from four perspectives: the man's perception of his wife, the wife's perception of her partner and lastly, how each partner judges that the other perceives them. It is thus a game of constant validation of the value each partner has for the other. Unlike the family and the couple, friendship is loosely institutionalized. It can be publicly appealed to and encouraged when associated to the notion of fraternity, for instance, but it is not subject to strict regulation. It is socially acknowledged and valued. It perfectly corresponds to the definition of the elective participation bond as it is perceived as selfless and void of social contingencies that characterize other forms of sociability.

The breakdown of the elective participation bond can take various forms as this bond covers different relationships. Generally speaking, romantic relationships or friendships can come to an end fairly easily in modern society, as they are not bounded by strict formal regulation. As individuals are free to tie this kind of relationships, they are also free to revoke them. Nevertheless, this does not mean that the breakdown of the elective participation bond causes no suffering. A divorce can be very traumatic and awaken previously

inflicted emotional wounds. It also results in the modification of the way both “me” and “us” are represented and affects the entire relational network of the individual, whether or not they are at the origin of the decision to break off the relationship. When reconstructing the trajectories of individuals who have experienced a series of relational breakdowns, divorce and separation often appear as the triggering factor. Friendships are equally fragile. New friendly relations generally develop over one’s life cycle and with regard to one’s geographic mobility. Although friendships initiated in early life stages are not necessarily formally breached, the relationships they are based often space out and even end altogether. As individuals’ lifestyles and habits progressively differ, it becomes increasingly difficult to maintain these relationships over time. This can result in relational isolation and to the experience of not being able to turn to one’s close ones for help and support when facing difficulties. In some cases, this breakdown can be lived out as a denial of due recognition, as a form of betrayal or rejection. The same process can occur between peers, in a club or in an association, either when one member is banned or decides to leave the group following humiliation or contempt.

In reality, the elective participation bond – quite like the lineal one – is at the origin of major inequalities among individuals. The probability of having a balanced conjugal relationship, maintaining numerous and varied friendships, being involved in associations, participating in peer groups within one’s neighborhood or one’s town all significantly vary in terms of one’s social standing. Consequentially, economic and cultural inequalities appear to be amplified by these elective inequalities. For instance, basing our analysis on the typology of urban neighborhoods developed by Edmond Préteceille, we observe that the rate of participation in associations in the Paris metropolitan region decreased from 38.6 % within the most affluent urban neighborhoods to 15 % in the neighborhoods where one finds a concentration of the working classes, the unemployed and the precariat (see table 2).

The *organic participation bond* differs from the previous bond as it is characterized by learning and carrying out of a specific function within division of labor. As we well know, according to Durkheim, functional complementarity – and organic solidarity – is what essentially fuels social integration in modern society as each individual is provided with a social position guaranteeing access to a basic level of protection and to the feeling of being useful. This bond is established at school and then extends to working life. While this type of bond takes on its full meaning with regard to logics of productivity prevailing in the industrial society, it should not be considered as fully dependent on the economic sphere. As Elias (1991) pointed out, in a society characterized by a high level of interdependent functions, the economy is not

Table 2: Participation in associations by type of neighborhood in the Paris region

Type of neighborhood	%
Upper-class neighborhoods	
S1. Spaces of the ruling elite	38,6
S2. Spaces of business executives	33,5
S3. Spaces of executives, liberal professions, IT and arts and entertainment professionals and traders	26,5
The entire neighborhood of upper-class types	32,3
Middle-class neighborhoods	
M1. Middle class with an over-representation of superior categories	22,1
M2. Spaces of qualified middle-classes	18,8
M3. Middle class categories, employees and laborers	20,7
M4. Those in precarious situations and the unemployed	17,0
All middle-class type neighborhoods	19,9
Working class types	
O1. Laborers, artisans and agricultural spaces	26,7
O2. Laborers, employees and public sector spaces	20,8
O3. Laborers and those employed under precarious conditions and the unemployed I	14,6
O4. Laborers and those employed under precarious conditions and the unemployed II	15,0
All working class neighborhoods	18,3
All SIRS neighborhoods	22,8

Source: SIRS Cohort, 2005. Typology of Edmond Préteceille's neighborhood.

N = 3020 individuals.

an independent sphere. It can only evolve in parallel with political and public organizations. The implementation of a system of obligatory social insurances based on work-life participation has modified the very sense of professional integration. In order to analyze the organic participation bond, one must take into account both the individual's relation to work, in accordance with Durkheim's analysis of functional differentiation and complementarity, and her relation to employment, which refers to the protective logic of the welfare state. Put differently, professional integration does not only refer to professional fulfillment but also to the connection – beyond the world of work – to the basic protection negotiated in the context of social conflicts regulated by a given welfare regime. Hence, for a wage-earning worker the expression “having a job” implies a possibility of an enjoyable productive activity, and at the same time, a guarantee for protection in the future. We can therefore

define ideal professional integration in terms of, firstly, the material and symbolic recognition of labor, and secondly, of the social protection assured by employment.

Following up on this analysis, it can be said that social insecurity has two different meanings today. Turning to Robert Castel's line of work, the first can be understood as the absence or, at the very least, the feeling of absence or weakening of protection against the social risks such as unemployment and poverty (Castel 1995). The second is close to what Pierre Bourdieu (1993) refers to – at least implicitly – as the misery of position as opposed to the misery of condition when analyzing the conditions under which social relations and the forms of domination that characterize them are constituted. Following the first definition, social insecurity is the result of the loss – to some extent at least – of social support. According to the second, it results from the validation of one's social inferiority leading to suffering and various forms of psychological distress, in particular a loss of self-confidence and a feeling of worthlessness. In both cases, it is a threat that weighs heavily on an individual and her family.

Both acceptations of insecurity are present in the concept of professional precarity depending on whether we take into account the relation to employment or to work as the analytical basis (Paugam 2000). The relation to employment refers to the protective logic of the welfare state, the second to the productive logics of the industrial society. Employees are said to be in a precarious situation when their employment is uncertain and they cannot predict their professional future. This is the case of employees with short-term contracts, as well as those who are consistently faced with the risk of lay-off. This situation is characterized by both high economic vulnerability as well as by a restriction, at least partially, of social rights as these are largely based on stable employment. The wage-earning worker therefore occupies an inferior position in the hierarchy of social status defined by the welfare state. In this sense, we can speak of *precarity of employment*. However, workers are also in a precarious position when they perceive their job as irrelevant, poorly paid and poorly recognized within the company. If their contribution to productive activities is not valued, they feel more or less worthless. We can then evoke *precarity of work*. These two dimensions of insecurity must be addressed simultaneously. They reflect the profound transformations of the labor market as well as the structural changes in the organization of labor.

More generally, the injunction of autonomy and the individualization of professional performance lead employees – almost inevitably, and regardless of their level of qualification and responsibilities – to attempt to distinguish themselves even from their immediate co-workers. This increases rivalry

and tensions among workers overriding the significance of their mutual membership in a specific category within the company's hierarchical order. Moreover, while most companies attempt to increase their flexibility, there are nevertheless significant differences from one company to another, so that the risk of losing one's job or of living in the fear of this perspective has become an important factor in the inequality between workers. In other words, far from reducing differentiations, the evolution of forms of professional integration consecrates the complexity of the socio-professional hierarchy, and at the same time, weakens the position of a growing number of employees. Inequalities are further reinforced if one takes into account the experience of unemployment (Schnapper 1981; Gallie and Paugam 2000).

Lastly, the *citizenship bond* is based on the principle of belonging to a Nation. In principle, the members of a nation have rights and duties, making them full citizens. In democratic societies, all citizens are equal before the law. This does not imply that economic and social inequalities disappear, but rather that the nation-state makes efforts to ensure that all citizens are treated equally, and together form a body with a shared identity and values. It is common today to distinguish between civil rights, which protect individuals in the exercise of their fundamental freedoms, political rights which ensure participation in public life, and social rights which guarantee individuals some form of protection against the vagaries of life. The expansion of individual fundamental rights corresponds to the consecration of the universal principle of equality and to the role assigned to each citizen, perceived to belong to the political community fully and despite her particular social status. The citizenship bond is also based on the recognition of the sovereignty of the citizen. Article 6 of the Universal Declaration of Human Rights states: "Law is the expression of the general will. Everyone has the right to take part in the government of his country, directly or through freely chosen representatives". It is also rooted in the protective logics of democratic equality. Citizens must possess the "material means necessary to remain the independent and self-sufficient beings that the notion of political legitimacy relies upon. The organization of education, employment protection and assistance to the most unfortunate is justified by the fact that citizens must have the capacity to be independent" (Schnapper 2000, 32). Protection and recognition, the foundations of social integration that we have previously discussed with regard to the other three types of social bonds, are also present in the citizenship bond which for its part is based on a demanding conception of the rights and duties of individuals.

It may seem paradoxical to argue that the citizenship bond too is subject to inequalities as it is intended to transcend them. However, just like the other types of bonds, the citizenship bond too can be breached. This is notably