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Caste, class, race, and inequality: insights for economic policy

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Abstract:

Disparities across social identity groups (such as race, caste, and ethnicity) are a global phenomenon, where significant differences in wealth and other socioeconomic outcomes are observed. Although the contexts and historical roots of these differences vary by country, there are common factors—particularly arising at the intersection of social identity and social class—that help explain the persistence of these inequalities. This issue of the *Oxford Review of Economic Policy* examines various dimensions of inequality tied to intergroup disparities and social hierarchy, drawing insights from policy responses across different contexts, countries, and regions. The article introduces stratification economics as a framework to understand these shared global patterns. It further reviews the papers published in the issue that explore topics such as social mobility, labour market discrimination, social exclusion, the role of artificial intelligence, the challenges associated with the interpretation and application of the law, the importance of data collection, and the role of existing and potential policy interventions (e.g. affirmative action and reparations) to address these persistent inequalities.

Keywords: stratification economics, racial disparities, inequality, economic policy.

JEL codes: J15, J18, J31, D63, G51, Z13, Z18

Introduction

Divisions in human communities can be analysed in a variety of ways, most prominently cleavages between social identity groups or cleavages between social classes. Social identity groups generally are classified by caste, race, ethnicity, gender, or religious affiliation categories. Social class typically separates members of a given community by distinctions in income, wealth, occupational status, or functional position in social production and reproduction.

The articles in this issue of the *Oxford Review of Economic Policy* explore various dimensions of inequality associated with social identity and social class. A useful shorthand description of the central theme of this edition of the journal, borrows from Oliver Cox's (1948) *Caste, Class, and Race: A Study of Social Dynamics*, the first major study to explore, conceptually, the relationship between caste and race as organizing principles undergirding social hierarchies.

While not echoing Cox's theoretical framework, the research here is dedicated to his conceptual triumvirate of caste, class, and race.[1] In particular, the articles explore reasons for—both historic and contemporaneous—and consequences of some social identity groups being disproportionately located at the lower end of the social class ladder while others are disproportionately located at the upper end. Why is there economic disparity between social identity groups, and what are the effects of such disparity?

[1] In fact, there are a number of aspects of Cox's research of which we are highly critical—some detailed below in the text of our introductory article.

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Persistent disparity across social identity groups is an international phenomenon. The magnitude and scope of cross-group inequalities are significant. Disparities in wealth are especially striking.[2] What is also troubling, is that these differences are not just unconditional but also conditional on other conventional drivers of inequality (e.g. education). In what follows, we consider the degree of wealth inequality across social identity groups across a range of countries where there are data of sufficient quality to derive reasonable estimates.

We direct attention to wealth—rather than income—because of the paramount role it plays in shaping opportunity and economic security for families and individuals. As a 2011 OECD report points out, 'Income allows people to satisfy their needs and meet many other goals they deem important to their lives, wealth makes it possible to sustain these choices over time' (OECD, 2011).

In the United Kingdom, between 2016 and 2018, the median level of White household wealth was £314,000, the highest among British ethnic groups; in contrast, Blacks with ancestry from African nations held a mere £34,000, the lowest among British ethnic groups and about one-tenth of the White level. Black households whose heads had Caribbean ancestry had a median wealth of £80,000, slightly more than 20 per cent of the White level. Households of Bangladeshi and Chinese ancestry had lower estimated median wealth than Caribbean Blacks, while Pakistani and Indian households had total wealth levels comparable to British Whites (UK Office of National Statistics, 2021).[3] Recent evidence also shows that most ethnic minority groups (Indian ethnic groups being the exception) are less likely than the White British to own their home and British ethnic minorities are also likely to hold financial debt and face a higher cost of debt (Karagiannaki, 2023).

Canada distinguishes between 'visible minorities' and 'non-visible minorities'. The latter category refers to persons identified as White, regardless of national origin, while the former category refers to persons identified as non-White, whether Black or Asian. 'Visible minorities', defined by the Canadian government as 'persons, other than aboriginal peoples, who are non-Caucasian in race or non-white in colour', cluster in a comparatively high-wealth community, the Asian population, with a lower-wealth community, Black Canadians. The category of 'non-visible' minorities combines the two major national origin groups in Canada, French Canadians and Anglo Canadians. Regardless, the data partitioned on this basis display large gaps between visible and non-visible minorities, in the order of visible minorities having about 40 per cent of the wealth of non-visible minorities, despite the exclusion of indigenous Canadians from the visible category (Billy-Ochieng, 2022).

Intergroup inequality in wealth in India is associated with caste and religious identification—and the intersection of the two. A study using data from 1991 and 2002 indicates the ratio of dalit (untouchable) wealth to all other castes' wealth ran between one-fifth to 40 per cent in both rural and urban areas. Urban dalits' wealth levels were consistently lower than for all other castes in rural areas. Moreover, since 'all other castes' combines both low- and high-caste Hindus, the magnitude of the gap that would be evident would be higher if dalit wealth was compared with high-caste Hindu wealth (Zacharias and Vakulabharanam, 2011).

Using a pragmatic method of combining multiple data sets, the most recent estimates of the distribution of wealth in India provide continued evidence of vast, sustained, inter-caste inequality. Nitin Bharti and collaborators (2024) report that 55 per cent of India's wealth is in the possession of the upper castes who constitute about 25 per cent of the nation's total population. Moreover, 90 per cent of billionaire wealth—what they refer to as the Billionaire Raj—is held by members of the upper castes (Bharti *et al*., 2024).[4]

Another study, relying on data for 2014–15, examines the distribution of a key asset, land ownership, by caste and religious affiliation in the Indian state of Uttar Pradesh. Landlessness was greatest—at rates running as high as 80 per cent—among lower-caste or 'out-caste' households and Muslim households. In contrast, landlessness rates among upper-caste, non-Muslim communities did not exceed 30 per cent (Tiwari *et al*., 2022).[5]

Estimates of the magnitude of racial wealth inequality in post-apartheid South Africa are reported in a paper using data on personal assets and liabilities from the National Income Dynamics Survey (NIDS) for 2017. The

[2] There are substantial differences in income across social groups in virtually all countries across the globe, but, generally, differences in wealth are significantly larger than differences in income.

[3] Based upon Census 2021, the following conditions involving the comparative distribution of wealth among British ethnic groups have been reported: 'Households from the Black African group were the most likely to be in the lowest quintile of total wealth. More than half (54 per cent) were in the lowest quintile (total wealth below £42,200), while more than three-quarters (79 per cent) were in the lowest two quintiles (total wealth below £185,600). Only 2 per cent of households from the Black African group were in the highest quintile (total wealth above £865,400). In contrast, households from the White British group were approximately nine times as likely to be in the highest wealth quintile and 18 times as likely as those from the Bangladeshi ethnic group.' (UK Office of National Statistics, 2021).

[4] Residential segregation by caste and religious affiliation produces elevated levels of public services deprivation for dalits and Muslims in India. The specific public services include 'schools, medical clinics, water/sewerage, and electricity' (Asher *et al*., 2023).

[5] While Uttar Pradesh (UP) is only one of India's 28 states, data on intergroup inequality there are highly informative, since UP alone has a population of *235 million* people.

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study finds that the ratio of Black to White median wealth in South Africa is just *5 per cent* (Chelwa *et al*., 2024). What's more, this estimated gap persists across different levels of educational attainment (i.e. White households with only a primary school education have more wealth than Black households where the head has a tertiary (college) degree). The wealth gap in South Africa is a persistent intergenerational constraint on Black social mobility lasting deep into the post-apartheid era (Chelwa *et al*., 2024).[6]

Despite some signs of convergence, racial wealth inequality in the United States remains significant. Data from the Federal Reserve's Survey of Consumer Finances for the United States suggest some reduction of racial wealth inequality between survey years 2019 and 2022.[7] However, despite this modest evidence of convergence based upon wealth ratios, in both cases the dollar value of the gap rose significantly. At the median, the monetary value of the Black–White wealth gap rose from an excess of $164,000 in White households' wealth in 2019 to $241,000. At the mean, the gap rose from an excess of $841,000 in White households' wealth to $1.15 million. Even after adjusting for inflation, both measures of racial wealth inequality in the United States displayed a real increase of at least 15 per cent (Addo *et al*., 2024).[8] This suggests the importance of caution in choice of measure of the change in wealth inequality over time.[9]

I. Caste, class, and race and insights of the field of stratification economics for economic policy

Apart from the introduction of stratification economics as a newer sub-specialty in their field, economists customarily have not engaged with the conceptualization of race, caste, and class. This type of work largely has been conducted by sociologists and social psychologists.

The afore-mentioned work of Cox (1948) was a pioneering contribution to the study of racial stratification. He challenged prevailing sociological interpretations that likened racial relations in the United States to the caste system in India. He claimed that analogies with casteism were inadequate because they did not account for the capitalist motivations behind racial exploitation in the United States, whereas, Cox argued, casteism arose primarily out of religious dynamics maintained over millennia. He maintained racial hierarchies were constructed and maintained to protect the economic interests of the ruling class, in contrast with his characterization of caste in India as purely the product of ancient cultural norms.

In the first paper in this issue, Christopher McAuley (2024) offers a review of Cox's work. He compares Cox's work with more recent approaches, especially Isabel Wilkerson's (2020) best-selling book, *Caste: The Origins of Our Discontents*. He frames his article as a corrective to Wilkerson's oddly brief treatment of Cox's book in which she seeks to make the argument that casteism is more useful than racism in understanding the nature of marginalization of Black Americans whose ancestors were enslaved in the United States.[10] Wilkerson seeks to extend the concept of caste beyond India, where it has been applied most extensively, proposing it as having wider applicability, inclusive of subjugation of the Jewish population in Nazi Germany and the subjugation of the US Black population.[11]

It is especially curious that Wilkerson does not engage critically with Cox's text, since he argued that racism (in the United States) and casteism (in India) are motivated in completely different ways. Cox viewed racism as primarily a mechanism to exploit Black labour and to divide Black and White workers to minimize organized resistance to capitalist arrangements. In contrast, he viewed the caste system both as arising out of ancient religious practices and being sustained by the retention of those archaic practices.

Cox, despite being a self-avowed analytical Marxist, disputed the racism–casteism parallel by invoking non-materialistic origins of the caste system, although non-capitalist systems (or non-capitalist modes of production)

[6] This is unsurprising, since pernicious employment discrimination also has carried over into the post-apartheid period (Naidoo *et al*., 2014).

[7] Measured at the median, the White to Black ratio of wealth fell from 7.8 to 1 in 2019 to 6.3 to 1 in 2022; similarly, measured at the mean, the ratio fell slightly from 6.9 to 1 in 2019 to 6.5 to 1 in 2022.

[8] In the US context, in particular, racial wealth ratios can yield misleading messages about the trajectory of the path of inequality. Because baseline disparities in net worth are so pronounced, changes in ratios over time that suggest a reduction in the degree of inequality can accompany a substantial widening of the dollar value of the gap—which better captures differences in economic opportunity and security.

[9] Systematic time series comparisons of this type require the use of harmonized data sets. The Survey of Consumer Finances used similar modules for collecting information about respondents' assets and debts.

[10] Wilkerson appears to treat racism as a concept that refers to interpersonal dynamics rather than policies, practices, and institutions that support and sustain the dominance of one social identity group over another (or others). This suggests, in turn, that the concept of *structural racism* is synonymous with her use of casteism.

[11] Technically the term 'caste' originates in Latin America with Spanish and Portuguese schemes of classification of 'racial types' in their colonies in the Americas. The term was imported to India in the eighteenth century by the Portuguese and applied to the system of hierarchy they observed there.

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have been sites of vast extraction of the social surplus by dominant social classes. The obvious examples in the Marxist pantheon are the slave and feudal modes of production.

Why did Cox opt for a distinctly non-Marxist analysis of the caste system in India? Why did he not apply a Marxist frame of reference to the social system of 'homo hierarchicus'?[12]

Cox, readily, could have asked which segments of the population are the source of surplus labour and which segments of the population extract and benefit from the appropriation of surplus labour. This would correspond perfectly to the structure of 'occupational specialization' under the caste system. From this perspective, the religious dictates of Brahmanical Hinduism codified by the Laws of Manu function as a *rationalization* of a social system anchored on exploitation of the untouchables and the lower castes.

Amit Thorat's contribution to this issue (2024; fully introduced later in this article), offers a comprehensive exploration of the history and current circumstances of social stratification in India, and suggests precisely such a material foundation for the tectonics of caste, rather than the caste system being solely a 'religious order' as Cox (1948) had it. In principle, one could conceive of a caste mode of production.

Stratification economics adds a crucial dimension to the discussion on race, caste, and class by explicitly focusing on the ways in which social group hierarchies are embedded in economic systems and how these hierarchies perpetuate inequality. Unlike other approaches that may have separated economic from or subordinated economic to social or cultural factors, stratification economics emphasizes the intersection of social identity with economic outcomes, thereby offering a more integrated framework for understanding processes producing marginalized groups. While Cox's analysis focuses on purported ideological and material differences between casteism and racism, stratification economics broadens this view by demonstrating how race and caste are used as mechanisms to sustain unequal distribution of resources in a variety of social formations.

McAuley's (2024) article is followed by John Davis's (2024) discussion of the subfield of stratification economics, elaborating how it differs from traditional economic approaches to our understanding of intergroup inequality. Stratification economics developed in response to explanations for divergent outcomes between social identity groups that attribute disparities to essentialized differences between the groups—whether genetic, cultural, and/or behavioural. Instead, stratification economics attributes the gaps to differences in group-based power and inherited group-based advantages across generations, anchored in environments sanctioning discrimination.

Stratification economics posits that individuals value not only the quantity of their personal possessions and their relative position *vis-à-vis* their salient peer, but also value the absolute and relative status of the social group(s) with whom they identify. Therefore, members of a dominant group will seek to sustain and extend any advantage their group holds, and, in general, subordinate groups will seek to resist the perpetuation of their position of inferiority. One of the authors of this article, in launching stratification economics, characterized it as follows:

> Stratification economics examines the structural and intentional processes generating hierarchy and, correspondingly, income and wealth inequality between ascriptively distinguished groups. For the stratification economist, claims about the defectiveness of a group with outcast/caste status are an ideological mask that absolves the social system and privileged groups from criticism for their role in perpetuating the condition of the dispossessed. (Darity, 2005, p. 144)

Kate Bahn and Carmen Sanchez Cumming (2022) at the Washington Center for Equitable Growth have said stratification economics is demarcated from other approaches to understanding inequality in economics by its direct analysis of the motivations of members of the dominant group:

> One of the most important insights of stratification economics is that privileged groups' material interest in maintaining existing social hierarchies is a key driver of inequality. Segregation, discrimination, and exploitation, for example, are all understood as mechanisms by which more powerful groups keep and protect their higher position in a social hierarchy.
>
> In recognizing that groups have a collective self-interest in maintaining or improving their relative standing, stratification economists understand and study efforts by dominant groups to uphold inequality as unjust, intentional, and rational.

John Davis's paper (2024) further situates stratification economics within a broader historical context, drawing on classical economists such as Ricardo and Marx while integrating insights from sociology and social psychology.

[12] Louis Dumont introduced the description of the caste system as 'homo hierarchicus' (Dumont, 1966).

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His work emphasizes the structural and behavioural dimensions of stratification, showing how economic systems are built on hierarchical social group divisions that reinforce intergroup inequalities. His work further extends the discussion by addressing how non-competing group theories and dual economy models explain labour market segmentation, focusing on how segmented economies preserve inequality across social groups. This builds on Cox's analysis of racial exploitation under capitalism but pushes the analysis further by providing a macro-structural framework that connects unequal distribution with group identity in non-capitalist societies as well.[13]

The field of stratification economics offers a comprehensive understanding of how identity and group membership shape economic outcomes. It offers explanations as to why market forces alone cannot resolve discrimination and inequality. It challenges the assumption of meritocracy and free-market fairness, highlighting the need for structural solutions to rectify historical and ongoing inequalities and it advocates for race-conscious policies (e.g. reparations) to address these systemic disparities and create a more equitable economic system (Chelwa *et al*., 2024).

However, its theoretical framework also demonstrates how difficult it will be to have any society adopt programmes that aggressively attack disparities between social identity groups. The group in the advantaged position can be expected to resist change that will alter both the absolute and relative position of the marginalized group for the better. In fact, there are circumstances where members of the dominant group will pursue policies to repress improvement for the subordinate group even when, mistakenly, believing the latter is catching up or running ahead (Kraus *et al*., 2019).

At minimum, stratification economics implies social policies to reduce intergroup disparity, while necessarily lowering the relative material wellbeing of the dominant group will have virtually no chance of consideration if they lower their absolute material wellbeing—other than by force.

II. Social mobility, health outcomes, and political (dis)enfranchisement: discrimination and the role of policy in The United States

Racial inequalities in the United States have been widely documented and explored and the evidence on racial disparities across different socioeconomic outcomes, particularly on labour market outcomes, is stark. There are a myriad of historical factors, policy decisions, and structural factors contributing to these entrenched systemic disparities (Chetty *et al*., 2020). While discrimination is often identified as an important explanatory factor (Lang and Lehmann, 2012; Lang and Kahn-Lang Spitzer, 2020 *a*,*b*), these disparities are not only the result of, but also the source of more discrimination. Indeed, as argued by Lang and Kahn-Lang Spitzer (2020*a*,*b*), racial inequalities also are likely to 'breed discrimination'.

There is an abundance of research in this field. The United States is perhaps the country for which most of the evidence on discrimination (particularly in labour markets) has been assembled.[14] To date, most exploratory and causal evidence comes from two major approaches to detecting discrimination: descriptive statistical studies using observational data (regression based) and field experiments (either in the field or in the lab) (Riach and Rich, 2002; Zschirnt and Ruedin, 2016; Neumark, 2018*a*; Lippens *et al*., 2022).

Discrimination extends far beyond labour markets, affecting areas such as education, criminal justice, and housing. This section of the issue adds to the existing literature by focusing on three critical outcomes: political enfranchisement, health outcomes, and social mobility. Each of the papers in this section provides extensive historical context and analyses the impacts of and the role of policy on these issues.

(i) Political (dis)enfranchisement

The history of disenfranchisement and exclusion in the United States can be traced back to the 1700s when African Americans and other racial minorities were systematically denied citizenship, preventing them from exercising fundamental rights such as voting. The US Constitution, in its original form, explicitly excluded these groups from the rights and privileges afforded to White citizens. Although progress was made with the passage of the 13th, 14th,

[13] On the behavioral side, Davis incorporates W. E. B. Du Bois's idea of a 'psychological wage' and Thorstein Veblen's theory of emulation, highlighting how social stratification is perpetuated through both material and psychological rewards, further embedding inequalities across generations.

[14] Occupational segregation or occupational 'crowding' on the basis of race and gender first was explored systematically with US data by Barbara Bergmann (1971, 1974). For Bergmann, occupational crowding constitutes the disproportionate confinement of one group of workers to the lower tiers of the job ladder and comparative exclusion from the upper tiers on the basis of their ascriptive characteristics. Bergmann found, with respect to race, Black and White workers were distributed differently across jobs and received different pay within jobs, regardless of their educational levels. Bergmann's initial work was undertaken using 1960 Census data. Darity and Hamilton (2012) obtained similar results with a Census sample drawn 40 years later.

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and 15th Amendments[15] after the Union victory in the Civil War—aimed at abolishing slavery, granting citizenship, and protecting voting rights—these advancements were undermined by setbacks such as the Jim Crow laws, which reinforced racial segregation and voter suppression.

In the aftermath of the Second World War, the Civil Rights Movement raised awareness of the segregationist practices and institutional racism that had become entrenched in American society. This movement led to significant legislative achievements, most notably the 1965 Voting Rights Act (VRA), which sought to remove barriers to voting for African Americans and other marginalized groups. However, progress has been uneven. While amendments to the VRA and other civil rights legislation have improved efforts towards inclusion, challenges to voting rights and political enfranchisement persist (e.g. voter suppression tactics and legal battles over voting laws).

The first paper in this section, takes stock of the progresses made and the impacts achieved since the VRA was enacted. In the paper, Andrea Bernini, Giovanni Facchini, Marco Tabellini, and Cecilia Testa (2024) ask: *Has political enfranchisement significantly improved the lives of subordinated racial groups in the United States? Has it fostered greater representation and influenced policy changes? Has it provided a platform for addressing social injustices?* The authors provide a brief historical analysis and take stock of empirical evidence on the effects of the 1965 VRA and further discuss and analyse the local level impact of the law on labour market outcomes, political participation and representation, and on public goods provision and policing practices.

The authors provide evidence of important gains in terms of Black voter registration and turnout, increased Black representation at the local, state, and federal levels, and gains in terms of local public goods provision, labour markets, and the administration of justice. However, and despite these changes, the authors also point to persistent obstacles and warn us of the setbacks and current challenges.

They specifically point at the resistance of racially conservative Whites in southern United States. This resistance has been manifested in political backlashes leading to important partisan shifts in favour of conservativism. Moreover, they document how following the ruling of *Shelby County vs Holder* (2013)—a US Supreme Court case challenging the VRA enforcement premises—there has been a weakening of the enforcement mechanisms of the VRA by invalidating the coverage formula used to determine which jurisdictions required federal preclearance for changes to their voting laws and therefore increasing the likelihood of further disenfranchising and reducing the gains made since the 1960s. This is a cautionary tale about the fragility of apparent steps toward progress.

(ii) Health outcomes

Health outcomes are intrinsically linked to many other socioeconomic outcomes. The Covid-19 pandemic highlighted and exacerbated these linkages along with existing racial and ethnic inequalities on a global scale. The evidence during and in the aftermath of the pandemic not only showed the disproportionate racialized health impacts of the pandemic (i.e. higher rates of infection and mortality), but it also demonstrated how these impacts were potentially the result of many socioeconomic conditions that made these populations more vulnerable. The lived experiences of minorities during the pandemic raises the questions: *what do we know about the racial inequalities of health outcomes, and how can these be explained? What are the likely historical and systemic explanations behind these differences? And what has been the role of policy?*

The paper by Marcella Alsan, Katherine Ianni, and Graeme Peterson (2024) examines health disparities in the United States, focusing on how health and insurance policies have contributed to sidelining the health of Black Americans and other marginalized communities, thereby perpetuating inequality. The authors also highlight the racialized impacts observed during the Covid-19 pandemic and draw attention to two other overlooked contemporary health crises: maternal mortality and opioid use disorder.

The authors argue that policies tying health insurance to employment and labelling it as a benefit, a practice established in the mid-twentieth century, have exacerbated racial health inequalities.[16] They document that, in 2021, about 60 per cent of the non-elderly population received insurance through their jobs, a system that presents significant challenges for many Black Americans and Hispanics, who are more likely to be uninsured. Despite progressive reforms like the 2010 Affordable Care Act (ACA), the authors assert that the healthcare and insurance systems remain fragmented and unequal, perpetuating structural inequities that disproportionately harm minorities.

In their analysis, the authors discuss the racialized impacts of maternal mortality, opioid use disorder, and Covid-19. The US has one of the highest maternal mortality rates among wealthy nations, with Black women facing significantly higher risks of pregnancy-related death, morbidity, and infant mortality. Opioid use disorder, initially

[15] Introduced and ratified in 1865, 1868, and 1870, respectively.

[16] An important question here is whether health insurance does matter for health and/or for racial health inequality, and by revising a robust source of evidence, the authors conclude that it does (for both).

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more prevalent in White communities, has increasingly affected Black Americans. The Covid-19 pandemic further exposed the link between discrimination and disease, revealing disparities in insurance coverage, healthcare access, and quality of care.

The paper emphasizes that racial health inequalities are deeply rooted, with solutions that are equally complex. The authors argue that the fragmented US healthcare system, despite consuming a large share of the nation's GDP, produces inequitable outcomes, particularly for low-income earners, and they advocate for comprehensive reform as a necessary step towards reducing racial health disparities.

To address these disparities, the authors focus on three key areas: insurance coverage, care quality, and diversification of the health workforce. They propose redesigning the US health insurance system to provide universal coverage, which could significantly reduce racial disparities in healthcare access. Improving the quality of care for racial and ethnic minorities is the second crucial area for reform. Black individuals are more likely to receive care from providers with less training, fewer resources, and lower-quality services than White patients. The authors suggest that allocating more resources to providers serving large Black populations could help reduce these disparities. Finally, the paper calls for diversifying the healthcare workforce by lowering financial barriers to medical education. Research shows that racially concordant care improves preventive service uptake and addresses the deep-rooted distrust of the healthcare system among marginalized communities, which stems from historical injustices.

(iii) Racial wealth inequality and social mobility: is higher education the answer?

Racial income inequalities in the United States have been widely documented. Black Americans, American Indians, and Latinos are more likely to experience lower lifetime earnings and reduced upward mobility (along with higher rates of downward mobility) compared to White Americans (Chetty *et al*., 2020; Bodenschatz *et al*., 2023). These disparities persist even when accounting for similar levels of educational attainment and controlling for a wide range of variables. In this context, higher education is often viewed as a key factor—a potential 'great equalizer' (Chetty *et al*., 2017). But the question remains: *Is it?*

In the final paper of this section, Fenaba Addo (2024) highlights that disparities in lifetime earnings persist even among those with higher education degrees. She argues that social mobility and achieving 'middle-class' status should be understood in the context of wealth inequality, with student debt playing a key role in perpetuating these disparities.

To provide some historical context, before 1965 Black students were often denied access to many higher education institutions. The passage of the Higher Education Act of 1965 increased access to higher education for Black students and introduced policies to provide financial assistance. However, while this led to some progress, Addo (2024) argues that the rising cost of education has far outpaced financial aid and grants, making higher education increasingly unaffordable. Financing education through debt has become the norm, placing a disproportionate burden on minority families, particularly Black Americans.

In her study, Addo uses a wealth-based metric to define middle-class status and presents evidence of persistent racial economic inequality. She notes that Black Americans are less likely to attain middle-class status and face greater financial risks, particularly through student debt, when pursuing higher education.[17] Even with higher education, Black graduates often encounter discrimination, lower wages, and limited career growth. Addo contends that higher education does not offer Black youth the same financial security or reliable path to middle-class status that it does for White youth. She concludes by calling for innovative policy approaches to address the student debt crisis and disrupt the link between wealth and access to higher education.

The papers in this section underscore how deeply entrenched racial inequalities are in the United States. While historical and structural factors continue to perpetuate these disparities, the authors collectively argue for comprehensive reforms that address not only the immediate symptoms but also the underlying systemic causes and entrenched sources of inequality. As the papers have carefully pointed out, the persistent observed gaps in wealth, health, and opportunity are not just reflections of past injustices but also active forces that shape the present (and future) of racial minorities in the United States.

III. Discrimination in labour markets and the law, and 'should we even collect data on race and ethnicity?': a European perspective

Following the highly publicized deaths of several African Americans at the hands of the police in the United States, the Black Lives Matter (BLM) movement garnered global attention, reigniting conversations about racial inequality,

[17] In the United States in 2022, Black heads of household with a university degree had $50,000 less in net worth than White heads of household who only finished high school (Addo *et al*., 2024, p. 171).

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systemic racism, and the urgent need for public policies to address these issues. The 2020 murder of George Floyd, in particular, sparked widespread solidarity, with mass demonstrations occurring across Europe and beyond, in cities such as Amsterdam, Berlin, Brussels, London, and Paris (King, 2020; Silverstein, 2021; Walfisz, 2023). This wave of global support brought renewed focus to discussions about racial inequalities in various countries and contexts outside the United States, exploring their origins, manifestations, and the strategies needed to address them.

The conversations in many European countries came with reflections about the differences in the form that racial inequalities take. While in the United States racial inequalities stem from the trajectory and history of slavery and segregation against African Americans and the immigration of Hispanic populations from south of the border, the European history of racial inequality stems from their history of colonialism, imperialism, and post-colonial (and current) immigration. Earlier regional initiatives to address racial inequalities included The European Commission against Racism and Intolerance which was established in 1993. However, before its establishment there was no single, dedicated body focused on addressing these issues (The Council of Europe, 2014).

In the United Kingdom, most conversations about racial inequality have been centred mainly on colonial migration, particularly around the issues faced by the Black British communities (with origins in the Caribbean and Africa), south and south-east Asian, and the African communities. The 2017 Windrush scandal is an example of how racial tensions have been brought to light and generated conversations and public demand for public policies to address inequalities (Williams, 2020, 2022).[18]

Early responses to racial inequality in the United Kingdom date back to the introduction of Race Relations Act of 1965 and the subsequent Race Relations Bill which came into law as the Race Relations Act 1968 (UK Parliament, 1968). The 1968 Act's focus on discrimination in housing and employment was responsible for the commissioning of the earliest correspondence tests[19] for discrimination in the UK (Daniel, 1968; Jowell and Prescott-Clarke, 1970; Riach and Rich, 2002).[20] This was followed by the establishment of the 1976 Commission for Racial Equality, which was established under the Race Relations Act of 1976 with the objective to promote racial equality and to fight against racial discrimination. In 2007, the Commission for Racial Equality was merged with the other equality bodies, the Equal Opportunities Commission and the Disability Rights Commission, to form the Equality and Human Rights Commission. A major milestone in the law was the Equality Act of 2010, which formally prohibits discrimination (in employment, education, housing, welfare system) based on various protected characteristics, including race and ethnicity. Part of the Equality Act is the Public Sector Equality Duty, which requires public authorities to consider how their initiatives, policies, and practices affect people with protected characteristics.[21]

Equality commissions were not unique to the UK, and some were instead more focused on discrimination. Some examples (among others) are:

- the Federal Anti-Discrimination Agency (*Antidiskriminierungsstelle des Bundes*) in Germany, established under the General Equal Treatment Act (*Allgemeines Gleichbehandlungsgesetz*), and enacted in 2006 with the tasked objective of fighting discrimination;
- the Defender of Rights (*Défenseur des droits*) in France, established, through a constitutional reform, in 2011;[22]
- the Netherlands Institute for Human Rights (*College voor de Rechten van de Mens*) established in 2012 to promote, protect, and monitor human rights and focusing on preventing and addressing discrimination;

[18] Named after the ship that brought one of the first large groups of Caribbean working migrants (i.e. from Jamaica, Trinidad and Tobago, and Barbados) to the United Kingdom in 1948 and in 1971 (and brought them to the country to address labour shortages), the Windrush generation, offspring, and descendants found themselves not only in stagnant socio-economic conditions (particularly in terms of employment, education, healthcare, interactions with criminal justice, and housing) but also living without the necessary documentation in the UK after decades of residence in the country (Williams, 2020, 2022). These issues were brought to light when some members of the community were not only detained but also denied legal rights (and some even deported) for not having documents that would prove their rights as naturalized citizens.

[19] Correspondence tests are research methods used to measure discrimination in different social contexts (e.g. hiring practices, housing, services). They involve sending out fictitious applications or inquiries that are identical in every aspect except for a single variable, such as race, gender, ethnicity, or age. The goal is to recover the role that a specific characteristic (while controlling for other factors) plays in the decision-making of third parties (Rooth, 2014; Verhaeghe, 2022).

[20] The study was commissioned by the Institute of Race Relations in cooperation with the United Nations Institute for Training and Research (UNITAR). The results of the study indicated evidence of discrimination in the labour market and in housing, with Asian immigrants (even those that completed secondary education in the UK) being the most disadvantaged, whereas Australians faced no discrimination compared to the British natives (Jowell and Prescott-Clarke, 1970).

[21] There are nine protected characteristics under the Equality Act of 2010: age, disability, gender reassignment, marriage and civil partnership, pregnancy and maternity, race, religion or belief, sex, and sexual orientation.

[22] The *Défenseur des droits* replaced four pre-existing institutions: the Mediator of the Republic, the Children's Ombudsman, the National Commission on Security Ethics, and the High Authority against Discrimination and for Equality. The main objective was the protection of rights and the fight against discrimination in France.

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- the Irish Human Rights and Equality Commission, which was established in 2014, under the Irish Human Rights and Equality Commission Act 2014.

Despite these legal advancements, the increasing use of algorithmic decision-making in hiring and employment practices introduces new challenges for ensuring equity and fairness. Maximilian Kasy's critical examination of algorithmic bias and fairness is particularly relevant in this context (2024, this issue). Kasy argues that many existing definitions of algorithmic fairness are aligned with the interests of decision-makers, often prioritizing objectives such as profit maximization over the welfare of disadvantaged groups. This critique is crucial for understanding the potential risks associated with the use of algorithms in labour markets, especially in contexts where discrimination is already present.

Kasy's work highlights that while algorithms can be designed to be 'fair' according to certain criteria, they may nonetheless perpetuate or exacerbate existing inequalities if they are not explicitly designed with the welfare of marginalized groups in mind. This insight is pertinent in many contexts including European labour markets, where discrimination against ethnic and religious minorities remains significant. The use of algorithmic decision-making tools in hiring, promotions, and even in judicial contexts (e.g. risk assessments) could reinforce existing biases if these systems are not monitored and designed to address equity issues actively.

In addition to the challenges posed by algorithmic bias, Shreya Atrey's analysis (2024, this issue) of judicial approaches to racialized economic impacts under the UK's Equality Act 2010 identifies another critical dimension of this issue. Atrey questions whether UK equality law serves as a backdrop to economic policies that disproportionately affect marginalized groups. Unfortunately, her findings suggest that despite a strong formal commitment to equality, this ideal is not always realized in practice.

Atrey's paper meticulously argues that evaluating the impact of discriminatory economic policies is a judicial responsibility. She challenges its understanding of race and its reliance on the objective categories specified in the 2010 Equality Act or clearly identifiable racial groups. This current legal approach excludes discrimination based on unenumerated grounds, like immigration status or the intersection of various social categories such as gender and nationality, and this narrow understanding limits protection for many marginalized groups, particularly those who face intersectional discrimination.

Atrey also critiques the inconsistent application of judicial scrutiny in cases involving racial discrimination, particularly in the economic context. While UK law theoretically supports robust scrutiny of policies that disproportionately impact racialized groups, Atrey finds that, in practice, courts often defer excessively to decision-makers, especially when economic policies are involved. This deference can lead to the under-protection of racialized groups, as courts may fail to rigorously examine the justifications for policies that produce discriminatory effects.

Through a series of court cases, Atrey presents a critical analysis of the gap between the legal principles enshrined in UK equality law and their practical application in cases of racialized economic impact. Her work emphasizes the need for a more stringent and consistent application of proportionality analysis in cases of indirect discrimination, particularly those involving racialized economic impacts. She argues that economic policies which disproportionately affect marginalized groups should be subject to the same rigorous scrutiny as any other form of discrimination. However, the current judicial approach often allows for economic justifications to override concerns about racial equity, thereby undermining the protective intent of equality law.

(i) Discrimination in labour markets

New concerns emerged against the backdrop of Brexit and the Black Lives Matter protests in 2020. In response, the UK government and the Race Disparity Unit of the Cabinet Office commissioned a report on race and ethnic disparities in the UK. Released in early 2021, the Sewell Report acknowledged that, although disparities persist, significant progress has been made in reducing racial inequality and concluded that there was no evidence of 'institutional racism' in the country (Commission on Race and Ethnic Disparities, 2021). This conclusion sparked controversy, with critics arguing that the report downplayed systemic issues (Doldor *et al.*, 2021; Tikly, 2022). Moreover, despite the Commission's findings, earlier data on pay gaps revealed that disparities not only remain but have also widened for Black, Pakistani, and Bangladeshi populations (Manning and Rose, 2021).

The second paper in this section, by Tessa Hall, Alan Manning, and Rebecca Rose (2024), contributes to the literature on labour market discrimination with an examination of occupational segregation in the UK. The paper offers some of the most up-to-date evidence, revealing that the findings of the Sewell Commission's report are not as positive as initially perceived. The authors make a significant contribution by assembling a comprehensive longitudinal dataset, enabling them to analyse the distinct career trajectories of ethnic and migrant groups. They examine pay gaps at labour market entry and the variations in pay growth over the life cycle, finding that these entry pay gaps are substantial, persistent, and do not close over time.

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The authors argue that these gaps can be attributed to occupational segregation and the over-representation of these groups in lower-paying firms and, within firms, in lower-paying roles. Additionally, they identify significant differences among ethnic groups, including greater penalties for migrants who arrived in the UK at older ages. The paper also explores potential explanations for these findings, such as historical and cultural connections between ethnic groups and specific occupations, the impact of social networks, and possible discriminatory practices in hiring.

The United Kingdom was among the first European countries to enact anti-discrimination legislation in the 1960s and now boasts some of the most comprehensive anti-discrimination policies and robust equality bodies in Europe. These laws have set clear standards for hiring practices and established norms aimed at minimizing biases in recruitment, such as providing training for employers and hiring committees and outlining explicit principles for fair hiring. As a result, one practice that is generally discouraged in the UK is including photographs in job applications, résumés, or CVs, as it can lead to discrimination based on race or appearance.[23]

While in the UK including photographs in job applications is explicitly discouraged, this practice remains common in countries such as Germany and Switzerland, despite not being legally required. This is concerning given the evidence of discrimination based on appearance and religion, as shown in audit and correspondence studies (Zschirnt and Ruedin, 2016; Bertrand and Duflo, 2017; Neumark, 2018*b*; Fernández-Reino *et al*., 2023; Lippens *et al*., 2023; Fernández-Reino and Rovira, 2024).

The next paper in this section examines the issue of ethnic and religious discrimination in hiring practices. Since some European countries still allow for the inclusion of headshot pictures in résumés—and in some contexts, there is a strong expectation of their inclusion—the paper investigates whether ethnic minorities have incentives to omit photographs from their résumés depending on the context and the extent to which their outward appearances diverge from the majority group.

Mariña Fernández-Reino and Martí Rovira (2024, this issue) address this question using data from the Growth, Equal Opportunities, Migration & Markets (GEMM) project audit field experiment (Lancee *et al*., 2021), conducted between 2016 and 2018 in the Netherlands and Germany. They assess the impacts of this practice and whether (and how) perceived racial differences affect hiring practices. Specifically, they explore whether omitting photographs from job applications can impact the probability of receiving positive callbacks from employers for ethnic minorities. Thus, the paper does not engage with employers' biases against applicants but rather explores whether there are incentives for ethnic minorities to downplay their racial or ethnic cues (i.e. résumé whitening).

The authors elaborate and hypothesize on the different incentives that ethnic minorities may have in terms of including or omitting a photograph from their résumé. These incentives are shaped by their outward appearance and by whether the practice of including a photo is a strong social norm (e.g. in Germany) or a weak one (e.g. in the Netherlands). The photographs in their experiment included different phenotypical traits and religious cues (e.g. women wearing hijabs).

Their findings are not straightforward as ethnic minorities may have incentives to *include* or *omit* photographs from résumés depending on the national context and the extent to which their outward appearances diverge from the majority group. In addition, the results show that outward appearance is more consequential for female than for male candidates.

For example, in the Netherlands, majority group women who attached pictures received a premium compared to those who did not. Also, unveiled Turkish women were better off submitting their picture, but the premium associated with the inclusion of photographs disappeared if they wore the Muslim headscarf. On the other hand, there was no discernible (dis)advantage for Moroccan women. In contrast, in Germany, minority women have incentives to omit their photographs, particularly if they wear the Muslim headscarf.

(ii) Should we even collect data on race and ethnicity?

Despite evidence of racial and ethnic inequalities across countries, not all nations collect data on race and ethnicity. A 2018 United Nations (UN) report on 'diversity and statistics' highlighted that many European countries are lacking in the scope and type of data collected (Balestra and Fleischer, 2018). Notable examples include France, Denmark, Germany, and Sweden, where policies, historical legacies, and cultural norms either restrict or outright prohibit the collection of information on ethnicity and race.

The above-mentioned UN report indicates that in these countries, data collection is primarily limited to immigration status, nationality, or country of birth, with little to no information gathered beyond these

[23] As per the Equality Act 2010 Employment Statutory Code of Practice, job applicants should only be asked to provide photographs when it is essential for selection purposes (e.g. acting or performance careers; for security purposes).

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categories.[24] This lack of comprehensive data has made it challenging to obtain representative quantitative evidence on racial inequalities and discrimination, leaving most of the available insights reliant on surveys or audit studies (LaBreck, 2021).

In Germany, historical factors such as Nazism and the Holocaust have led to strict limitations on the type and extent of information that can be collected. Although nationally representative surveys in Germany typically gather high-quality socioeconomic data, including information on migration background, there are significant restrictions on collecting data related to race and ethnicity.

France also exemplifies a country that prohibits the collection of data on race and ethnicity. This stance is rooted in the principles of universalism and the belief that all French citizens are equal under the law. The underlying idea is a 'colour-blind' approach, where all citizens are encouraged to identify with a single French identity, regardless of their ancestry or background (LaBreck, 2021). Consequently, data collection on race is currently restricted by both the French constitution and laws, including the 1978 Data Protection Act (*Loi Informatique et Libertés*). Additionally, in 2018, the word 'race' was removed from the French constitution during a National Assembly vote, leaving only the term 'origin'.

The 'colour-blind' approach has been controversial (Donadio, 2020; Piser, 2020; Arezki, 2023). In practice, the absence of diversity data does not mean that certain groups are free from significant disadvantage, discrimination, or exclusion. This lack of data hinders the ability to identify and address disparities, making it challenging to implement targeted policies that effectively combat inequality across racial groups. However, it's important to acknowledge that policies such as those of the German government are not necessarily dismissive of these issues. Instead, they may be attempting to balance the need to address disparities with the respect for other historical sensitivities, a nuance that deserves recognition in this discussion.

The final paper in this section, by Yajna Govind and Paolo Santini (2024), examines the 'colour-blind' approach in France and evaluates evidence of discrimination based on origin. The authors use data from the Trajectories and Origins survey, which includes information on individuals' origins (such as the place of birth of individuals, their parents, and grandparents) and perceptions of discrimination related to skin colour. They introduce a novel index that measures the degree of individuals' perceived alterity. This index is used to explore the extent of discrimination faced by phenotypically non-White groups, with the data also capturing individuals' perceptions of discrimination. The authors find that being perceived as foreign or not 'truly French' is linked to a labour market penalty for the current generation. They emphasize the need for comprehensive data collection to support effective efforts in combating discrimination.

The studies discussed in this section reveal that, while some European countries have made notable progress in addressing racial inequalities, significant gaps remain in understanding and effectively combating these issues. The findings in these papers also further highlight the necessity of accurate data collection and the importance of tailored policies to address racial disparities.

IV. History, trajectory, and impacts of affirmative action policies: experiences from Brazil, India, and the United States

Affirmative action encompasses measures designed to address discriminatory preclusion of members of marginalized groups from preferred positions, and it is predicated on the existence of unfair or unjust exclusion of individuals based upon their identity as members of a stigmatized group (Darity, 2013). Specifically, it involves practices in various sectors, including labour markets (such as hiring and promotions), higher education (e.g. university admissions), and government agencies (involving the evaluation of policies or equality consideration in public-sector decisions), with the goal of enhancing the status of individuals with protected characteristics by providing access to placements from which they customarily have been excluded (Holzer and Neumark, 2006; Darity, 2013).[25]

Affirmative action measures are not meant to create general equality nor address poverty, nor are they reparations for historical oppression. Instead, they aim to promote inter-group equality (racial, ethnic, or gender). When used effectively, affirmative action helps diversify and desegregate elites (Darity, 2013). The main goal is to ensure that socially disadvantaged groups achieve similar levels of job status, education, and income as those of more socially dominant groups. The implementation of such policies, however, has often been contentious, with debates

[24] Nationality, citizenship, and country of birth data are primarily collected to track immigration trends and facilitate studies on migrant integration. However, this approach often overlooks second-generation migrants and beyond, leaving them unaccounted for in the statistics when looking at racial inequalities.

[25] Protected characteristics under equality law include age, disability, gender, civil status, race, religion, sexual orientation, and nationality among others.

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around their effectiveness and fairness. This controversy often revolves around the tension between ensuring equitable outcomes and the perceived fairness of preferential treatment. This issue is particularly pertinent when considering the increasing role of algorithmic decision-making in admissions, hiring, and other areas where affirmative action policies are applied.

Kasy's (2024) work on algorithmic bias and fairness is particularly relevant here as he advocates for a shift towards a welfare-based paradigm that considers the broader impact of decisions on the welfare of disadvantaged groups. In the context of affirmative action, this means designing policies that not only seek to equalize opportunities but also address the long-term welfare outcomes of marginalized communities. This challenges the effectiveness of affirmative action policies that rely on algorithms for decision-making, and highlights the need for careful consideration of how these systems are designed and the values they encode.

For example, in the United States, the debate over affirmative action increasingly intersects with discussions about the use of algorithms in university admissions and employment decisions. The recent US Supreme Court ruling in *Students for Fair Admissions vs President and Fellows of Harvard College* (2023), which declared explicit racial and ethnic preferences in college admissions unconstitutional, raises questions about how universities will navigate admissions processes without traditional affirmative action frameworks. Kasy's work suggests that reliance on algorithms in this new legal environment could further entrench inequalities unless these tools are explicitly designed to promote social welfare and equity. These concerns also extend to the design of affirmative action policies in contexts other than the US where the use of artificial intelligence is also becoming prominent and raises a call for action in considering the need for a welfare-centric approach to fairness as suggested by Kasy.

(i) Affirmative action in three different contexts: the US, India, and Brazil

This section of the issue explores different facets of affirmative action, particularly focusing on race, in three distinct contexts: the United States, India, and Brazil. India and the US have relatively long histories with affirmative action. India's national history with affirmative action dates to the 1950s, now over 70 years ago, but it also was practised in a few of the princely states under colonial rule as early as the beginning of the twentieth century (Chandola, 1992; Ramkumar, 2021). In the United States, affirmative action was legislated in 1964 by the Civil Rights Act, but it was not truly activated until 1969 by the Nixon administration. Brazil's experience, however, only spans two decades when, in 2003, the University of Brasilia became the first federal university to implement affirmative action policies in admissions (Heringer, 2024).

Examining affirmative action in these three countries underscores the importance of understanding the specificities of each context, the different mechanisms at work, and the unintended consequences associated with these policies. While these countries share a common objective of advancing social equity and addressing historical injustices, their approaches differ in terms of design, implementation, legal frameworks, and societal contexts. Despite the widespread belief that affirmative action addresses historical wrongs, there is ongoing debate about whether it truly offers restitution for past injustices. This raises an important question for the design of policies which is: is affirmative action a form of restitution? is it about diversity?

In the United States, affirmative action was designed to address racial disparities rooted in the legacies of slavery, colonization, and segregation affecting African Americans and Native Americans.[26] Similarly, Brazil's racial hierarchy historically placed Afro-Brazilians at a disadvantaged position, although discussions about race have often been muted and complex due to historical denial and stigma. Despite a slavery history that parallels or even predates that of the United States, Brazil only saw the introduction of affirmative action policies and a formal acknowledgment of 'Black consciousness' in the early 2000s. In India, affirmative action addresses the enduring impact of the caste system, which has historically marginalized certain castes, trapping them in systemic disadvantage and discrimination for centuries. This system, with its hereditary nature, has long perpetuated social and economic disparities.

The implementation mechanisms of affirmative action vary significantly across countries. In the United States, quotas are generally prohibited, whereas they are more commonly used in India and Brazil. Despite notable progress attributed to affirmative action in all three countries, the policy has been a source of considerable controversy and debate. In the United States, this has led to a gradual banning of affirmative action, first at the state level and more recently at the federal level.

In the United States, affirmative action policies emerged from the civil rights movement of the 1960s and were solidified through President Lyndon B. Johnson's War on Poverty and the Civil Rights Act of 1964 (Title VI).

[26] Gender disparities are also a target of affirmative action programmes and most evidence, at least in the United States, has shown that it has led to significant improvement for White women, in particular, in education and labour markets (see Parker, 2021, and Massie, 2017).

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This legislation formally prohibited discrimination based on race, colour, or national origin in programmes and activities receiving federal financial assistance. Following the Act's passage, higher education institutions began incorporating race and ethnicity considerations into both hiring practices and admissions processes (Garrison-Wade and Lewis, 2004).[27] Unlike labour market practices, however, affirmative action in higher education lacked explicit federal regulations, resulting in a decentralized approach without standardized national practices.

Despite universities often making explicit statements about their commitment to affirmative action, higher education institutions have retained significant discretion over the specific practices they implement. This flexibility has led to controversy and scrutiny, fuelling ongoing debates both for and against affirmative action (Holzer and Neumark, 2006; Antman *et al*., 2024).

There are varied arguments both for and against affirmative action policies.[28] Proponents argue that these policies are crucial for addressing historical injustices and systemic inequalities. Economists have also used arguments balancing the equity–efficiency trade-off to argue that promoting equity can also lead to greater efficiency. As explained in Holzer and Neumark (2006) market imperfections (e.g. discrimination, imperfect information) can lead to inefficient use of (human) resources, and affirmative action policies can create efficiency gains through increased productivity. The argument is that enhancing social mobility and equalizing opportunities (absent due to historical factors) can lead to increased productivity (overall better use of resources).[29]

Opponents of affirmative action, on the other hand, argue that these policies can lead to reverse discrimination and potential inefficiencies (lower productivity). Critics also point out that the stigma associated with affirmative action can adversely affect the performance of beneficiaries in academic and labour markets. Other standard 'grumbles' include violating the principles of meritocracy, lack of preparedness of recipients, programmes should instead be implemented on the basis of class (not race or ethnicity). Many of these qualms have been addressed directly in Darity (2013).

Affirmative action in the US has been challenged at different jurisdictional levels and since as early as 1978 (just 14 years after the Civil Rights Act) with the *Regents of the University of California vs Bakke* which resulted in a US Supreme Court ruling of race quotas as unconstitutional. This was followed with numerous other Court appeals for violations to the Equal Protection Clause of the Fourteenth Amendment of the US Constitution and other state-led bans (see Garrison-Wade and Lewis (2004), Holzer and Neumark (2006), and Arcidiacono *et al*. (2015) for a complete historical account of affirmative action policies in higher education).

Following the 1978 ruling, other cases have followed leading to the banning of affirmative action initiatives in different US States, including Texas (1997), California (1998), Washington (1999), Florida (2001), Georgia (2002), Michigan (2006), Arizona (2010), New Hampshire (2012), and Oklahoma (2013). This set of affirmative action bans have now culminated with the 2023 US Supreme Court ruling (*Students for Fair Admissions, Inc. vs President and Fellows of Harvard College*) which states that explicit racial and ethnic preferences in college admissions are unconstitutional.

The paper by Francisca Antman, Brian Duncan, and Michael Lovenheim (2024) in this section of the issue breaks ground in analysing the long-run impacts of affirmative action bans by looking at earlier bans (Texas, California, Washington, and Florida) and their consequences on educational attainment and on labour market outcomes of the cohorts that were exposed to the bans. Their paper presents a set of theoretical predictions regarding the impacts of the bans for underrepresented racial groups, arguing that the impacts can be ambiguous (the quality–fit trade-off).

Ambiguities arise from two sources. First, bans lead to lower representation of minorities in selective universities, negatively impacting degree completion and earnings. This is countered by the 'mismatch' hypothesis which poses that affirmative action admissions at selective universities can lead to achievements below those of majority students and therefore lead to (i) sorting-out of more technically demanding degrees (which are associated with higher earnings) and (ii) low level of preparedness leading to lower performance.

Their results suggest that the bans on affirmative actions are nuanced. Underrepresented minority women are more likely to be affected in terms of the possibilities of admission to selective institutions. In particular, Hispanic women have a lower likelihood of completion (4 percentage points), a reduction in attainment (1.7 percentage points), earnings (8.1 per cent), and employment (3.6 percentage points). Effects on men are, however, modest with suggestive evidence of improved earnings for Black men suggesting that the relative magnitude of college quality versus mismatch effects vary for minority men and women. These results open the door to many important

[27] These policies initially targeted African Americans.
[28] This debate tends to concentrate on admission practices rather than other approaches for recruitment and retention.
[29] However, to date, evidence on the impact of changing workforce composition on productivity remains mixed, often showing neutral effects.

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questions regarding the potential impacts of the national ban, the new directions in admission processes and how (and whether) they'll still use race and having a better understanding of the reasons for nuance in the different results across groups.

Affirmative action—also known as the reservation system—in India has aimed at correcting historical injustices due to the caste system oppression and to the exclusion on the lower casts (i.e. scheduled castes, SCs, and scheduled tribes, STs). As explained in Deshpande (2008) and Deshpande and Ramachandran (2024), the caste system was hereditary and associated with an occupation-specific division.

Although the origins of affirmative action in India can be traced back to the British colonial period, the 1950 Indian Constitution introduced the first formal systems (articles 15, 16, and 46). Reservations (quotas or reserved seats) for SCs and STs were primarily focused on education, public-sector employment, and elected government positions, and were understood as 'compensatory discrimination' in favour of these marginalized groups (Deshpande, 2024; Deshpande and Ramachandran, 2024). Other mechanisms include relaxation of criteria and financial assistance.

The reservation system in India is also not only a vertical system across mutually exclusive categories, but also overlaps horizontally with other categories such as gender, religion, disability, etc. However, an important chapter in the history of affirmative action in India following the establishment of the Mandal Commission (Second Backward Classes Commission) in 1979, was the extending access to Other Backward Classes (OBCs) to public-sector jobs in 1993, and subsequently access to education in 2006.

Ashwini Deshpande and Rajesh Ramachandran (2024) in this issue, draw from their wealth of work on this topic to summarize the history, the mechanics, and the evidence on affirmative action policies in India.[30] Much of the evidence points to positive impacts on educational attainment, public-sector jobs effectiveness, and political/legislative representation and acceptance (Deshpande and Ramachandran, 2024).

The authors also present the most up-to-date evidence on outcome gaps. Using nationally representative data, they focus on three outcomes: human capital, occupational distribution, and wealth proxies. They find that despite significant progress and social change, the caste gaps still remain in education and wealth. They also look at the impact of the extension of affirmative actions to OBCs and find increased education attainment. The authors note that although progress has been made, more comprehensive approaches are needed to close the caste gap.

The last paper in this section looks at the case of Brazil. Andrew Francis-Tan and Maria Tannuri-Pianto (2024) present a fascinating account of the historical context and precedents of affirmative action policies. Perhaps more similar to the case of the United States, the racial and ethnic diversity in Brazil is mostly as a result of its history of colonization, slavery, and immigration. Slavery created a marked racial hierarchy that has lasted over many years and followed a myriad of mixed-raced individuals (with White Europeans and indigenous groups) that lined up in the hierarchy on the account of colour.[31] However, unlike the case of India and the United States, Brazil's experimentation with affirmative action policies is more recent and dates to the early 2000s.

Following years of oppression, the Afro-Brazilians and the Black movements started embracing the term Negro (Black) and also started self-identifying as such (instead of the other mixed categories such as Preto (term used in the Census and making up 9.1 per cent of the population). The idea of self-identification as Negro, as the authors point out, has been a response to create Black consciousness (Francis-Tan and Tannuri-Pianto, 2024).[32] The first affirmative action initiative started in 2001 with the Ministry of Agrarian Development's introduction of racial quotas for Blacks' employment followed by racial admission quotas at different state universities.

Affirmative action policies in Brazil have not come without controversy, as the authors note. Most of the forms these policies have taken are quotas or bonus points. In 2012, the Law of Quotas (race and class based) was established for all federal universities in the country. Francis-Tan and Tannuri-Pianto offer new evidence showing that, as of 2022, racial inequality in education has decreased (but that has not been the case for wealth inequality) and argue that affirmative action may have been one reason, among others. They also draw conclusions from the evidence of a wealth of studies including their own work, pointing that (i) we are still unclear on whether affirmative action policies increase pre-college efforts and human capital investments; (ii) low-income and non-White students are, however, more likely to gain access to higher education and selective majors, and that (iii) there is little evidence of the mismatch hypothesis discussed earlier in this section. In terms of labour market outcomes, (iv) most evidence points to positive impacts in the form of higher early career earnings for beneficiaries.

[30] The authors have written extensively on the topic (see Deshpande, 2008, 2024; Deshpande and Ramachandran, 2017, 2019).

[31] As noted in their paper, Brazil not only imported more slaves than the colonial United States, but also it was the last country in the continent to abolish slavery (in 1888).

[32] Given the fluidity and mixing of races in Brazil, the authors point at a potential impact of affirmative action policies on ethno-racial identification, highlighting increases in the population that self-identifies as Black.

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V. Reparations

Perhaps the most provocative and potentially transformative policy to attack intergroup inequality is reparations for the group subjected to systematic marginalization. Reparations has been defined as a 'program of acknowledgement, redress, and closure for a grievous injustice [or injustices]'(Darity and Mullen, 2020).

In the US context, a plan for reparative justice has been proposed as a mechanism for direct elimination of the racial wealth gap. The rationale is to offset an array of policies, across multiple generations, that built White American wealth and deprived Black American descendants of persons enslaved in the United States of the capacity to build wealth. Those policies include the US government's provision of 160-acre land allotments to 1.5 million White families under the Homestead Act of 1862 while denying the newly emancipated freedmen the 40-acre land allotments they were promised as restitution for the years of bondage, the sanctioning of 100 massacres that took Black lives and led to the seizure of Black-owned property by the terrorists, the discriminatory application of government policies to support homeownership in the twentieth century, and the destruction of Black neighbourhoods and business districts under 'urban renewal' programmes (Darity and Mullen, 2020).

Arguably, the racially one-sided land distribution policy in the aftermath of slavery in the United States was the foundational moment for the contemporary Black–White wealth gap. In parallel, the failure to undertake a land reform on behalf of the dalits in the post-independence period in India has contributed to continued dense intercaste economic inequality.

While India was the first country in modern times to adopt affirmative action (or what is called 'the reservation' system in India), mistakenly, it has been construed in some circles as reparations. However, affirmative action is more accurately labelled as one measure in a set of anti-discrimination policies. It is not compensation for a long history of discrimination and its present-day impact (Darity and Mullen, 2020, pp. 248–9).

Amit Thorat's article (2024, this issue) includes a discussion of the record of the demand for a land reform on behalf of the dalits. The details of the actual proposals for land reform fall short of true reparations for Thorat because they promised titles to land that the sudras and dalits worked, but not to compensate them for the historic appropriation of their surplus labour ('agrestic' or slave labor).

In the 1940s one dalit advocate, Sardar Nagappa, urged a more dramatic policy—the distribution of 10 acres of wet land and 20 acres of dry land to each dalit household—as an authentic reparations measure. Nagappa even declared that land redistribution on this scale was so vital in changing the landscape of caste-based opportunity that he would take the programme of land redistribution over the adoption of affirmative action on a national scale. Nevertheless, no land reform of any significance was enacted while the reservation system was written into the 1950 Indian constitution.

Given the long account of failure to adopt reparations for Black American descendants of US slavery, understandably there is pessimism about prospects for it ever being enacted in the United States. Are there any grounds for optimism?

One point of hope is the fact that there has been a dramatic positive change in attitudes towards Black reparations in America. A survey taken in 2000 found that 59 per cent of Black Americans and 4 per cent of White Americans supported monetary payments as reparations. By 2021, the proportions had risen to 86 per cent for Black respondents and to near 30 per cent among White Americans (Darity and Mullen, 2022).

Adding to this sense of optimism, Thomas Craemer's paper (2024, this issue) provides critical insights into the public support for Black reparations in the United States. Craemer uses survey data to gauge the viability of public support for Black reparations there. Explicitly framing his attitudinal study in the context of issues raised by stratification economics, he finds the magnitude of non-Black support or opposition to Black restitution is influenced heavily by the sense of implicit identification with Blacks on the part of non-Blacks. To the extent the degree of implicit identification can be increased, support for Black reparations can grow. Of course, how precisely to do that remains an open question that Craemer begins to explore, tentatively, at the close of his paper. A full answer may hold the key to altering the structure of intergroup inequality in the United States and elsewhere.

VI. Final discussion and insights for economic policy

This edition of the *Oxford Review of Economic Policy* delves into caste, class, race, and inequality, offering key insights for the design of economic policies to address disparities in economic outcomes across social identity groups. It uses the framework of stratification economics as a foundational lens essential for understanding the perpetuation of social divisions. This approach emphasizes how historical and group-based advantages, particularly those linked to race, caste, or ethnicity, sustain unequal economic outcomes. These dynamics, rooted in inherited power structures, manifest in varied ways across different countries and regions, dictating the shape of global inequality.

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Although not all contributions to this issue are explicitly connected to stratification economics, their insights align with its principles. The articles collectively emphasize that inequality cannot be fully understood without considering the intersection of social identity (race, caste, ethnicity) and economic class, or what sociologist Imari Smith refers to as 'concurrent identities'. Addressing disparities requires policies that focus on the specific disadvantages experienced by marginalized groups. Additionally, the issue highlights the necessity of comprehensive data collection on race, ethnicity, and caste. Countries like France, which follow 'colour-blind' policies, may unintentionally perpetuate inequality by failing to gather the data necessary for targeted interventions aimed at resolving historically entrenched disparities.

Some key lessons emerge from this issue. For instance, affirmative action and reparations are both tools designed to address historical injustices, but they serve distinct purposes. Affirmative action is aimed at countering ongoing discrimination against marginalized groups, while reparations is a compensatory message for the historical wrongs suffered by those groups. Both policies need to be carefully designed to ensure effectiveness and prevent misuse by dominant groups. What we also learned from the discussion in the papers is that racially conscious policies and initiatives can find resistance, as illustrated by the recent banning of affirmative policies at the federal level in the United States and recent court cases challenging voting rights enforcement mechanisms. It raises the importance—as discussed in one of the papers—of understanding trends in public opinion and targeting initiatives to foster public support. This seems like a giant task, but it lends scope for optimism.

The issue also underscores the growing role of artificial intelligence (AI) in decision-making. While AI offers the potential for more efficient and unbiased outcomes, it can also perpetuate or even intensify existing biases if not properly monitored and designed. As we increasingly rely on new technologies, it becomes vital to embed inclusion principles into AI systems to prevent them from reinforcing systemic inequalities.

Finally, consider two key aspects: education and health. Education has often been heralded as a route to social mobility. However, it may not be as effective in reducing group-based inequality as is commonly believed. We have learned from the research presented here that the benefits of higher education can be unevenly distributed, particularly for groups already disadvantaged by systemic discrimination, lower intergenerational wealth, and student debt. Similarly, while socioeconomic status is linked to health outcomes, racial and ethnic health disparities persist even after accounting for income, highlighting the need for healthcare reform that targets historically disadvantaged groups.

In conclusion, the fight against inequality requires a multi-layered approach that includes targeted economic policies; robust data collection; the rethinking of the role of AI, its principles, applications, and design; and a deep understanding of the social and historical contexts that shape disparities. Addressing these issues through policy interventions considering current discrimination and historical injustices are necessary if the goal is achieving true equity and social justice.

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