

# GLOSSARY

# Demystifying Wealth Inequality: A Glossary for Understanding and Action

Wealth inequality is one of the most pressing issues of our time. To deepen understanding of the topic and inspire meaningful action, we are proud to present this glossary, created through the collaboration between the Julius Baer Foundation and COES (Centro de Estudios de Conflictos y Cohesión Social) in Chile.

The bilingual glossary, available in both English and Spanish, is designed as a resource to demystify key terms and concepts related to wealth inequality and social mobility. By providing clear, research-based definitions, it aims to educate readers and provoke thoughtful reflection on the mechanisms driving inequality — and the pathways to creating change.

The glossary is enriched with relevant data and insights from the projects supported by the Julius Baer Foundation and its partners. These examples illustrate how addressing wealth inequality is not only achievable but essential for fostering social cohesion and creating equal opportunities for all.

By bridging academic research and real-world impact, this glossary highlights the importance of tackling wealth inequality through collective action. We invite you to explore these terms, reflect on their implications, and join the conversation about reducing inequality and building a more just and equitable society.

Let this glossary serve as both a starting point for action and a tool for understanding — an invitation to address one of the defining challenges of our era.

Together, we can transform insights into meaningful change. **Together, let's embrace the role of changemakers!**



# Absolute social mobility

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Is the social mobility that comes from the changes in the income distribution or occupational structure - within a given society or across different ones. Currently, these changes are associated with wider occupational transformations, such as the drying up of certain jobs (e.g., manufacturing plants) or the creation of new ones (e.g., software developer). Absolute mobility indicates the proportion of individuals that remain in the same income or occupational position as their parents ('immobile') and the proportion that move upward or downward. In most Western societies, during the economic prosperity that followed World War II, absolute mobility documented that more people moved out of the working-class and joined the middle-class than in previous decades.

# Achievement gap

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Refers to the significant and persistent difference between social groups regarding their educational performance and attainment. This condition may affect diverse disadvantaged groups based on characteristics such as gender, race/ethnicity, wealth inequality or geographical location. Standardised tests and other relevant indicators are useful to measure and monitor achievement gaps and educational disparities. For instance, PISA (Programme for International Student Assessment) results consistently show that boys outperform girls in mathematics, which may be associated with the fact that women are underrepresented in STEM (Science, Technology, Engineering, and Mathematics) disciplines and careers.

# Affirmative action

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Consists in policies and strategies that seek to provide equal access and opportunities to members of historically oppressed and excluded groups. It can be implemented either by a public or private institution and can concern diverse areas such as education, health or employment. In different countries, affirmative action policies have been oriented towards systematically discriminated groups such as ethnic communities or women.

# Algorithmic bias

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Refers to systematic errors made by computer systems and algorithms against certain categories. These errors are the result of incomplete or inaccurate information and data. In the social sphere, algorithmic bias can include an unfair representation of some social groups, which can lead to discrimination, particularly against historically excluded groups (e.g., discrimination based on class, gender, ethnicity, or sexuality). Furthermore, algorithmic bias can mislead public policy decision-making, which contributes to reinforcing the reproduction of social inequalities.

# Aspiration

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Is the desire, hope or ambition of achieving some goal or pursuing a specific activity. Aspirations vary within and across societies. Some people aspire to travel around the world during their holidays, others to perform a sport, and yet others to be highly successful in their jobs. To a large extent, aspirations are socially influenced or shaped through families, the educational system, and the media. They also vary significantly across national contexts. In social mobility research, aspirations mainly concern the desire or expectation to achieve a better class position (e.g., upper-middle-class) by individuals, families, or groups within or across societies.

# Asset

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Refers to different resources (e.g., economic, social, cultural, educational) used strategically by people to improve their wellbeing or position in society. Assets have different meanings in different national contexts: in some societies, assets are mostly confined to economic resources, while in others the cultural or social dimensions have greater prominence. In the context of wealth inequality and social mobility, assets mainly concern resources with economic value (e.g., business, financial, housing) that an individual, corporation, or country owns or controls with the expectation that they will provide a future benefit in the form of cash flow, reduce expenses, or improve sales. Assets are key components in the accumulation of wealth over time.

# Basic income

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Refers to the idea that states should provide a minimum income for people who are unable to meet their basic needs in a given society (e.g., unemployed individuals). In most societies, basic income has been a key component in the development of welfare rights and systems. In recent years, scholars have proposed the establishment of a universal basic income: an unconditional income provided to all members of society on an individual basis without any prerequisite. This idea has inspired policy initiatives and pilot projects in countries such as Brazil, Canada, and Finland.

# Centralisation

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Refers to the concentration of authority, power, and decision-making in a single entity at the top level of the administrative system. This can be observed in political and organisational contexts. An example of centralisation would be the case of a large corporation, where decision-making is concentrated in a small group of individuals at the top levels of management.

# Circular economy

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Refers to a model in which products and materials (e.g., clothing or plastic) are used as long as possible in order to extend their span of life. Essential to this scheme is to promote practices that involve sharing, reusing, recycling, repairing, and refurbishing. In this way, products and materials are put in permanent circulation, which helps reduce waste to a minimum.





# Women in Plant Oil Production

## Namibia

Women in Plant Oil Production grants disadvantaged women access to land, farming, and financing skills to establish jojoba plantations and start their own businesses. Through its support, the women develop from small-scale farmers into entrepreneurs in a global marketplace. Previously lacking resources and skills, the women now sell their oil worldwide and have also developed an important local market.

# Class ceiling

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Refers to the barriers faced by people who experience upward mobility in different occupational fields (e.g., culture, politics, and business). These difficulties can adopt two main forms. The first is a pay gap that prevents these individuals from obtaining equivalent earnings to those from privileged backgrounds. The second concerns the obstacles confronted by these individuals to rise through the organisational ranks into senior positions.

# Class identity

*/kla:s/ /ai'den.tə.ti/*

Refers to how people recognise themselves in relation to others in society - based on the identification of a common class situation. This identification is related to a subjective perception of people's social position. For example, in many countries most people tend to identify themselves as middle class, even when they do not meet the objective parameters (income, occupational) associated with the middle class.

# Colonialism

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Can be defined as a system of domination and exploitation in which one group of people, known as the colonisers, exercises political, economic, and social control over another group, known as the colonised. It is a relationship of power that is characterised by unequal social, economic, and political dynamics. The colonisers typically assert their dominance through various means, including military force, legal systems, cultural assimilation, and the imposition of their values, beliefs, and institutions on the colonised population. This process leads to the marginalisation, oppression, and disempowerment of indigenous people, who have often been subjected to forced labour, land dispossession, cultural erasure, and discriminatory policies.

# Cultural capital

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Refers to a wide range of cultural knowledge or resources (e.g., preferences, tastes, or educational credentials) used by individuals, families, and groups to improve their social position. Cultural capital can serve both to reproduce class inequality and favour processes of upward mobility. Upper-middle-class parents typically mobilise their greater cultural resources than working-class parents to help their children succeed at school or university, thus reproducing existing class inequality. Access to university for students from disadvantaged backgrounds can be a vital route to improve their cultural capital (e.g., obtaining a prestigious educational credential) and, in so doing, their chances of upward mobility.

# Cultural consumption

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Refers to the process through which individuals and groups engage with cultural products, practices, and symbols and how they derive meaning from them. Cultural consumption can vary according to social factors such as social position, education, gender, ethnicity, and age. Cultural consumption and cultural capital are intertwined concepts, used to analyse how individuals and groups interact with cultural elements and how these interactions impact their social status and opportunities. Cultural consumption can contribute to the accumulation of cultural capital, and an individual's cultural capital can shape their choices and preferences in cultural consumption, ultimately influencing their social status and interactions within society.

# Decentralisation

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Refers to the dispersed distribution of authority, power, and autonomy at different levels of the administrative system. In federal systems, such as the United States, power is divided between the central government and regional or local authorities, where each level holds certain decision-making power, allowing for more local autonomy.

# Decile

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Refers to each of ten equal groups into which a population can be divided according to the distribution of values of a particular variable (e.g., income, wealth, social mobility). Deciles are widely used in statistics and studies of inequality. For instance, a common measure of income inequality is the decile dispersion ratio. This measure compares the average income of the richest ten percent to that of the poorest ten percent, and thus highlights the income share of the rich as a multiple of that of the poor.

# Decoloniality

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Is a critical framework and set of practices aimed at challenging and undoing the enduring legacies of colonialism. It emphasises the recognition and revitalisation of marginalised and excluded cultures, knowledge, and ways of life. One example is the revitalization of Mapudungun which is the language of Mapuche indigenous people in Chile and Argentina.

# Discrimination

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Refers to the unequal treatment given to an individual, family, or group for arbitrary or unjustified reasons, due to their class, gender, sexual orientation, age, or ethnic background. This unequal treatment, negatively affects upward mobility - and can occur in settings as diverse as households, educational institutions, and the workplace. A notorious case of racial discrimination was the apartheid in South Africa, an institutionalised racial segregation system blocking or hindering the opportunities of black people to rise in society.

# Distribution

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Is a collection of data on a variable (e.g., income, wealth, social mobility) that can change in quantity, quality, or size. In statistics, this distribution typically shows the possible values for a variable in a given population. For example, the distribution of wealth tackles the way in which the wealth of a nation is divided among its population, or the way in which the wealth of the world is divided among nations. Importantly, the distribution of wealth varies over time and across national contexts. Such patterns of distribution are basic tools for research on inequality and can be studied by various statistical means, all of which are based on data of varying degrees of reliability.

# Diversity

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Is defined as the encounter between different identities and social characteristics. These identities and characteristics can include properties and aspects such as gender, race, ethnicity, sexual orientation, age, social class, religious or ethical values system, origin, and political beliefs of individuals of a community, groups, or societies. Diversity can be observed at different scales: within a household, a village, a company, or a country.



# MEET

## Israel and Palestine

While Israel is called a 'start-up nation', its minorities are significantly underrepresented in the knowledge industry. Palestinians, women, and Arab populations in Israel lack access to quality STEM (Science, Technology, Engineering and Maths) education and professional networks, perpetuating segregation, fear, and distrust in the region. MEET enables them to develop quality STEM, entrepreneurship and leadership skills to create lasting, meaningful change in their communities.

# Downwardly mobile people

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Refers to individuals, families, or groups who move downward in a given society. The son of a young middle-class entrepreneur who becomes bankrupt after an abrupt financial crash (such as the global financial crisis in 2008) may experience downward mobility if his father is no longer in a position to afford a good education for him. For this son, this downward trajectory may involve not just a lower income than he might have had, but also potentially joining the lower-middle-class or the working-class.



# Economic capital

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Refers to assets such as money, real estate, equipment, or financial investments - used as resources by individuals, families, or groups in society. Economic capital can serve both to reproduce class inequality and favour the process of upward mobility. In most societies, affluent parents typically dispose over more money to invest in their children's educational development and indeed devote more of it compared to their working-class counterparts. The financial aid provided by universities to low-income students (e.g., bursary, scholarship) can be vital for their successful completion of higher education and their chances of upward mobility.

# Education inequality

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Refers to the unequal distribution of education opportunities among different individuals, groups, or societies. It arises when access to education, resources, and support is not provided or denied, which leads to differences in educational attainment, life skills development, and opportunities. Education inequality starts with early childhood development prior to compulsory schooling. The acquisition of foundational literacy and numeracy (FLN), typically obtained during primary school education, is considered crucial for all subsequent education phases that build up on these skills. Educational inequality can be associated with various factors such as socioeconomic status, race, ethnicity, gender, geographic location, and disabilities. Education is often considered a prerequisite to building wealth and is therefore crucial in improving the lives of those from less privileged backgrounds.



# ISRD

## Manipur

Poverty and discrimination prevent many girls from realising their educational potential in India. Some stop already in primary school. Or never even start. ISRD is supporting children and a network of parents, teachers, and local leaders to ensure local girls can attend school.

# Educational internationalisation

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Refers to the process of expanding the provision of educational services beyond national borders. Educational institutions, particularly in the higher education sector, seek to export their educational services and attract new stakeholders at a global scale. This contributes to the creation of global elite institutions that contribute to the reproduction of privileged groups at a worldwide level. Internationalisation not only involves teaching and learning but also research collaboration, collaborative knowledge production, and networking. However, it can also involve unequal power relations between institutions and countries, particularly between those from the Global South and the Global North.

# Education mobility

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Refers to the movement of individuals, families, or groups in society in terms of their educational level. Those who are the first generation in their families to attend university are a typical example of educational mobility. Higher education levels across generations are associated with increased knowledge in diverse subjects, better occupational prospects, and higher income.

# Elites

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Refers to very small groups of people who enjoy a disproportionate influence in society. In their social background, education, and occupations, elites are predominantly more privileged than non-elite populations. However, elites can also be composed of people from disadvantaged backgrounds via processes of upward mobility. Although elites tend to be interconnected, there are different types of them. Economic elites, typically in control of powerful economic institutions or organisations, can influence important economic decisions within and across societies. Cultural elites typically enjoy a high influence in non-economic spheres such as the arts, letters, and civic associations.

# Empowerment

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Refers to a multi-dimensional social process that improves the capacity of individuals, groups, and communities to maximise the quality of their lives. It is not solely an individual process, but involves collective action for social change. It emphasises the importance of building supportive networks and engaging in collective efforts to challenge oppressive structures and policies. It recognises that power is unequally distributed in society - and seeks to address and redress power imbalances. It aims to dismantle systemic barriers, discrimination, and inequalities that limit individuals' opportunities and voice, and to create conditions that enable individuals and communities to exercise greater control over their own lives.



# TAWAH

## Tanzania

TAWAH connects Mhaga village women with female architects, engineers, university students, and graduates to build a vocational centre as a local hub of empowerment. Previously unable to find employment, the women now acquire basic building and business skills to boost their income and strengthen their community.

# Equality

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Refers to how evenly access to resources, rights, and opportunities is distributed throughout individuals, families, and societies. Most democratic societies seek greater equality for their members - in fields as diverse as education, justice and health. However, in most nations, rising levels of income and wealth inequality have stalled or countered the efforts made to achieve greater equality. Therefore, most societies have been working to achieve equality for individuals, trying to bring more opportunities and access to resources. For example, in some countries the access to a quality education and public health is guaranteed as a right for everyone.



# Equality of opportunity

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Is the principle stating that the allocation of individuals to places in society is determined by some form of competitive process, in which all members should be eligible to compete on equal terms. In practice, this means striving to make people's lifetime opportunities as independent as possible from their parents' resources, their gender, ethnic background, and place of birth. The resulting society should thus be shaped by people's own choices and efforts. This principle has gained widespread traction across the world - and is especially important for enhancing social mobility, but rising inequality threatens its successful implementation.

# Ethnic ceiling

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Refers to the barriers faced by ethnic minorities in their careers due to their ethnicity in different occupational fields (e.g., culture, politics, and business). The barriers experienced by ethnic minorities are visible across different societies (e.g., Haitians in Chile, Maori in New Zealand, or Inuit in Canada) because of their skin colour, the way they speak, and where they come from. The ethnic ceiling can adopt two main forms. The first is the lower wages that ethnic minorities receive for the work they do, particularly in top income occupations. The second concerns the low representation of ethnic minorities in senior positions in most organisations, positions typically held by white men.

# Ethnic enclave

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Refers to a distinct ethnic group that exists within a larger society but maintains its own unique identity, practices, and geographical space within that society. Ethnic enclaves are often formed as a result of migration or the settlement of marginalised or disadvantaged groups seeking support, protection, or the preservation of their cultural heritage. Ethnic enclaves are characterised by a sense of cohesion and solidarity among their members, who share common characteristics, experiences, or affiliations. They may offer a space where individuals can maintain and express their cultural, linguistic, or religious identity. Examples of ethnic Enclaves are Cubans in Miami and Chinese in New York City.

# Ethnicity

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Refers to a group of individuals with a common culture. Thus, the group members share a cultural identity which is rooted in common practices, values, and beliefs that distinguish them from other social groups. Cultural aspects such as language, ancestry, geographical location, and religion are, among others, essential properties shaping ethnicity. How to respect and recognize ethnic diversity within educational settings is a central challenge for inclusive growth.

# Exclusion

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Refers to the process through which individuals or groups are marginalised, distanced, or excluded from different spheres of society (e.g., education, work, health). It involves restricting or denying individuals or groups opportunities for participation in the decision-making processes of social life, which deteriorates social cohesion and social integration in society. There are different types of exclusion, such as social, economic, cultural, or political, and the exclusion in one of these spheres may increase the risk of exclusion in another.

# Expectations

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Refers to ideas and beliefs about the future that inform individuals' behaviour, actions, choices, and decisions. Expectations imply realistic evaluations and estimations regarding one's future possibilities within society. Individuals have educational or occupational expectations, which are influenced by different structural constraints (based on wealth, gender, or ethnicity) that limit people's opportunities and options. Thus, for instance, while members of the upper class often show high educational expectations, working-class individuals tend to present lower expectations.

# Fairness

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Refers to a principle encouraging the impartial and just treatment of people in spheres as diverse as education, workplace, and the access to justice. Under this general principle, people should relate to each other as equals within societies defined by reciprocity and the commitment to equality of opportunity, as well as the avoidance of favouritism or discrimination. Fairness and equality may be similar concepts but are not the same. Fairness is giving people the same opportunities or chances regardless of their status in life, whereas equality refers to how evenly access to resources, rights, and opportunities is distributed throughout individuals, families, and societies.

# Family wealth

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Refers to the amount of resources families or households accumulate over time. Unlike private wealth, which largely focuses on financial capital, family wealth encompasses wider resources, such as stocks, bonds, and other investments, as well as real estate and family businesses. Family wealth tends to be transmitted by one generation of a family to another. This process of intergenerational wealth transmission within families is shaped by a wide array of factors, including class background, gender, and ethnicity. Family wealth, particularly among rich households, plays a highly significant role in the reproduction of inequality in societies, ensuring wealth stays concentrated by passing it on to the family's next generation.

# Gender

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Is a concept that describes cultural differences between men and women. Unlike the notion of sex, which relies mainly on biological features, gender involves primarily social expectations, attitudes, and practices that are considered more appropriate or suited for one group over another. Recently, the notion that there are gender identities beyond the binary of male and female has gained strength. An example of gender is what is expected of gender roles in paid work. Women are expected to work in occupations related to care giving and domestic housework; and men are expected to work in occupations associated with production and manual labour.

# Gender inequality

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Refers to how unevenly people are treated due to their gender. In most societies, men tend to enjoy more opportunities, advantages, and rights than women and people identifying as non-binary. Gender inequality unfolds over time and is manifested in diverse settings, such as educational institutions, in the workplace, and in access to financial loans or property ownership. In most societies, for example, women are expected and tend to assume more unpaid work, such as domestic work, care and support activities for other households, community and voluntary work.

# Gentrification

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Is a process of neighbourhood change that includes economic change in a historically disinvested neighbourhood — by means of real estate investment and new higher-income residents moving in, as well as demographic change, not only in terms of income level, but also in terms of changes in the education level or racial make-up of residents. Often, the process ends up making housing and lifestyle in the neighbourhood unaffordable for low-income households who used to live in the area.

# Geographical mobility

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Is the change of residence of people between countries, cities, or regions regardless of their legal status, the reason for the movement, or the duration and permanence of their stay. An example of this phenomenon is the geographical movement that occurred in most countries where people from rural areas moved to urban areas in search of better professional and educational opportunities.

# Glass ceiling

*/glɑːs/ /ˈsiː.lɪŋ/*

Refers to the barriers faced by women in their jobs due to their gender in different occupational fields (e.g., culture, politics, and business). These barriers can adopt two main forms. The first is a pay gap negatively affecting women in top income occupations, such as law, medicine, and finance. The second concerns the low representation of women in senior positions in most organisations, positions typically held by men.

# Glass escalator

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Is a metaphor used to explain gender segregation, specifically the structural advantage that males possess in female-dominated occupations that tend to help them move up the ladders in the workplace and advance their careers. Some examples of this condition may be found in healthcare work or school teaching. Indeed, men tend to be perceived as possessing more desirable qualities for leadership roles than women, and, as a consequence, they are fast-tracked into supervisory roles.

# Global North

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Besides the geographical division between the northern and southern hemispheres, the term Global northern refers to a group of countries located in North America, Europe, and the United Kingdom, characterised by their wealth, technological advancement, and geopolitical power. This does not imply that everyone in the Global North is wealthy and powerful. There are significant inequalities both within and between the Global North countries.

# Global South

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Besides the geographical division between the southern, and northern hemispheres, the term Global South is employed to describe a group of countries located in Asia, Latin America, Africa, and Oceania, which are characterised by their low income, large inequalities, and geopolitical marginalisation. Another meaning refers to a space of resistance to the effects of power concentration and colonisation in the Global North, for example by highlighting other types of knowledge, such as indigenous and tribal knowledge.

# Health inequality

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Refers to the unequal distribution of health outcomes and access to healthcare among different social groups within a society. Health inequality is rooted in structural inequalities, such as wealth inequality and social stratification that exist within societies. Socially disadvantaged groups, such as those with lower socioeconomic status, racial/ethnic minorities, and marginalised population, often experience higher rates of health problems and poorer health outcomes compared to more advantaged groups. This can involve differences in morbidity (the prevalence of diseases and illnesses), mortality rates, life expectancy, disability rates, and overall wellbeing.



# Partners in Health/ APZU

## Malawi

PIH Malawi empowers adolescents aged 10–19 living with HIV through medical care, skills training, and networking to realise their potential and become productive members of their community. Students are trained in tailoring, brick laying, motorcycle and motor vehicle mechanics. Today, adolescents who were stigmatised and lacked supportive health services are able to participate in the workforce.



# Hidden curriculum

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Refers to the informal and unspoken norms, beliefs, attitudes, and behaviours transmitted by the different actors that make up a specific educational setting. These cultural elements are implicitly conveyed within teaching and learning scenarios and they respond to the dominant values within a certain society or community. Thus, the hidden curriculum may repress children's and young people's identity, culture, and knowledge they bring from their own social background. A hidden curriculum reinforces and reproduces uneven social relations and may hinder social mobility

# Human capital

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Refers to the knowledge, skills, abilities, and social attributes that individuals possess and can utilise in the pursuit of economic and social opportunities. It is a concept that recognises the value of individual capabilities as a form of capital that can contribute to individual and collective wellbeing, productivity, and social mobility. Human capital is seen as a form of capital that individuals can accumulate and leverage to improve their life chances and social standing.

# Identities

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Identities configure fundamental features of a person or a collective. Rather than being inherently fixed, natural expressions, they are sociocultural constructs. They emerge while interacting with others. Identities may be related to ethnic, religious, class, gender, sexual, or other social categories. Identities are crucial to comprehend different forms of social inequalities that affect disadvantaged and stigmatised groups.

# Income inequality

*/ˈɪŋ.kəl.ə.ti/ /,ɪn.ɪˈkwɒl.ə.ti/*

Refers to how unevenly income (i.e., the amount of money people are paid for the work they do) is distributed within and across societies. Scandinavian societies are much more egalitarian than African or Latin American ones in terms of their income distribution. Societies with higher income inequality tend to have poorer outcomes in wellbeing, health, and social mobility.



# Fundamental

## Colombia

The project 'Trófica' by Fundamental helps informal waste pickers become recycling professionals and association members. By building a recycling network, Fundamental links the recyclers with collection centres, waste generators, and upcycling companies. Previously living on meagre earnings, the coordinated recyclers now earn more money in better working conditions.

# Income tax

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Refers to a mandatory contribution, often imposed by governments, on the income generated by an individual, family, or company. In most countries, income tax is a responsibility of individual taxpayers, who must file an income tax return annually to define their tax obligations. Income tax is an important source of revenue for governments. Income tax is typically used to fund government financial obligations, sustain welfare systems, and provide public goods.



# Inclusion

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Is the process of growing participation and recognition of people in society. It involves enhancing people's opportunities and access to resources, ensuring their rights, dignity, and identities are respected, and improving the terms of participation in society for people who are disadvantaged on the basis of age, sex, disability, race, ethnicity, origin, religion, economic, or any other status through enhanced opportunities. An example of inclusion is inclusive education, where all students are welcomed and included at the educational institution and in the classroom, so everyone (e.g., students with disabilities or pupils from minority ethnic groups), regardless of their differences, takes part in the educational process as an equal.





# Codespa

## Philippines

CODESPA connects seaweed farmers with multinational corporations, fostering a mutually beneficial business model. Farmers become key players in the value chain, selling quality dried seaweed directly to global buyers, creating a more efficient supply chain. This allows wealth to flow from the private sector to local communities, reducing inequality.

# Inclusive growth

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Refers to an approach that seeks to ensure that the benefits generated by growth are accessible to everyone in society, a condition that would help to combat inequality and poverty. Moreover, not only should the benefits be made inclusive, but the growth processes themselves should also be accessible to all members of society. This means that marginalised groups need to be actively involved in them too.

# Inequality

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Refers to how unevenly access to resources, rights, and opportunities is distributed throughout individuals, families, and societies. It can manifest through hierarchies and/or boundaries associated with class, gender, ethnic inequality, or a combination of these factors. Although in recent decades income and wealth inequality have gained increasing prominence, most societies struggle with multiple types of inequality. The persistence of these compounded inequalities — class, gender, ethnic — over time are associated with less opportunities for upward mobility, poor health conditions, and different practices of discrimination and stigmatisation.

# Inter-generational mobility

*/ˌɪn.tə.dʒen.əˈreɪ.fən.əl/ /məʊˈbɪl.ə.ti/*

Refers to the movement of individuals, families, or groups between generations. Traditionally, mobility research has been conducted using a two-generation (parent-to-offspring) view of social mobility in society: what social class a person ends up in at some particular point in their life compared to the social class their parents were in when they were children. The daughter of an industrial worker who now works as an engineer after attending university represents a typical example of inter-generational upward mobility.

# Intersectionality

*/ɪn.təˌsek.fənˈæɪ.lə.ti/*

Is a concept addressing the multiple disadvantages experienced by some individuals, families, or groups, in society. In most nations - these experiences of exclusion or disadvantage are commonly faced by minorities. For example, a black Muslim woman experiences a triple disadvantage: one related to her gender, another related to her religion, and yet another to her race. Importantly, in practice, these disadvantages work together, not in isolation. The notion of intersectionality serves to tackle the connection between these two or more forms of disadvantage that can block or hinder opportunities of upward mobility.

# Job quality

*/dʒɒb/ 'kɔːl.ə.ti/*

Refers to how people's work is valued and respected - and meaningfully contributes to the goals of the organisation (e.g., private sector, government, NGOs) in which they work. Job quality includes not only contractual clarity between employer and employee, but also having a voice in one's workplace and the opportunity to shape one's work life. Job quality is strongly related to the quality of individuals' lives and their wellbeing, as well as their productivity, economic performance, and chances of occupational mobility. Stagnating economic growth can be a threat to job quality and indeed lead it to deteriorate. Such conditions may lead to a rise in job informality – a phenomenon that continues to exist in many countries.

# JOBLINGE

## Germany

JOBLINGE helps young people with migration backgrounds and/or from low-income environments identify their strengths and find matching career paths. Previously disadvantaged and marginalised, the participants now receive guidance on acquiring the necessary vocational skills to enter the job market successfully.



# Life chances

*/laɪf/ /tʃɑːnsɪz/*

Refers to the opportunities that individuals have to access different resources, goods, and services. Typically, life chances are defined by people's class position and status in society. Thereby, in unequal societies, individuals have different life chances according to their specific social characteristics (e.g., class, ethnicity, or gender). On the other hand, societies that offer greater life chances for their members, which includes access to quality education and employment, can also offer greater possibilities for upward social mobility.

# Literacy

*/ˈlɪ.tər.ə.si/*

Refers to the skills and competencies that individuals develop to read and write throughout their lives, although literacy is also related to speaking and the ability to communicate. Given that building literacy starts before schooling, children's significant others, such as the members of their family, are particularly relevant in the first stage of the literacy process. Then, schools play a fundamental role in literacy acquisition. Education inequalities may result in uneven levels of literacy between social groups, which implies fewer life chances and possibilities for social mobility for members of excluded groups.

# Mentorship

*/ˈmen.tɔː.ʃɪp/*

Refers to the guidance provided by an individual with advanced experience and knowledge in the workplace or an educational institution to younger or less experienced people. This guidance provides support and increases the possibility of mentees' upward mobility. It has also been suggested that mentoring can have benefits regarding gender equality. For example, when women climb to senior roles, they can mentor junior women within the workplace or school, sharing leadership behaviours that are non-gender specific and how to tackle the barriers that women face at work.





# Forge Foundation

## Mexico

Forge Foundation's 'Tu Futuro' project supports youth in their last year of high school. By developing young people's social and technical skills, the project supports them on their journey into the labour market while also strengthening their social networks through online media projects launched in collaboration with students from high-income backgrounds.

# Meritocracy

*/,mer.ɪˈtɒk.rə.si/*

Refers to the principle stating that it is merit based on individual talents and/or efforts, not social background, that should determine who experiences upward or downward mobility in society. This principle has gained increasing popularity across the globe in recent decades. But higher levels of inequality, particularly wealth inequality (e.g., inherited resources), threaten the successful implementation of the meritocratic principle in society. Social mobility research acts as a fundamental check on how the meritocratic principle is met in reality.

# Multi-generational mobility

*/.mʌl.ti.dʒen.əˈreɪ.fən.əl/ /mæʊˈbɪl.ə.ti/*

Refers to the movement of individuals, families, or groups across more than two generations. Multi-generational mobility is particularly significant to study the accumulation and transmission of wealth inequality in families and households across many generations, including the role of grandparents, parents, and grandchildren. For instance, recent research reveals that in many nations there are associations between the wealth held by grandparents and that of grandchildren, independent of the wealth held by parents.

# Occupational mobility

*/.ɒk.jəˈpeɪ.fən.əl/ /mæʊˈbɪl.ə.ti/*

Is the movement of individuals, or groups within or across social structure in terms of their occupations, which influences the chances achieving social mobility. For example, those who lost their jobs due to the social effects of the COVID pandemic are typical examples of how downward occupational mobility means fewer chances achieving upward social mobility and wealth accumulation.

# Parental educational involvement

*/pəˈren.təl/ /,edʒ.ɪˈkeɪ.fən.əl/ /ɪnˈvɒl.v.mənt/*

Is the active participation of parents — or legal tutors — in the children's schooling process with the aim of improving their educational experiences and school performance. Parental involvement in schooling may also involve the cooperation between parents and the school. Middle-class and upper-middle-class families are more likely to engage intensively in these kinds of routines, which may increase the advantages of the privileged groups and reinforce social inequalities.

# Percentile

*/pəˈsen.taɪl/*

Refers to each of the 100 equal groups into which a population can be divided according to the distribution of values of a particular variable (e.g., income, wealth, social mobility). Percentiles are widely used in statistics and studies of inequality, particularly over the past decade. Nowadays, the study of financial elites, global inequality, and wealth management has gained importance - because through such statistics and studies, it is possible to understand the difference of income and wealth between the richest and the poorest, and how to act against social inequalities.

# Pluralism

*/ˈplʊərə.lɪ.zəm/*

Refers to the recognition of the coexistence of diverse social groups, beliefs, values, and interests within a society. It emphasises the idea that society is composed of multiple social, cultural, and ideological dimensions, and that no single group or perspective should dominate or suppress others. From a wealth perspective, pluralism acknowledges the coexistence of different economic structures in societies, such as capitalism, socialism, and various hybrid models, as well as diverse views on wealth distribution and economic justice.

# Plutocracy

*/plu:ˈtɒk.rə.si/*

Is a small group of people exercising power or influence on societies either directly or indirectly, by their wealth or income. That means that wealthy people can influence the decisions or establishment of government policies that benefit the rich, often at the expense of the lower classes. The word is commonly used to complain about what is considered to be an unfair system.

# Poverty

*/ˈpɒv.ə.ti/*

Refers to a social condition characterised by inadequate access to satisfy basic necessities, limited opportunities, and marginalisation within society. It is understood as a result of the action of social and economic structures, rather than an individual failing. It encompasses a range of deprivations - including insufficient income, lack of access to education, healthcare, housing, nutritious food, and social support networks. Overall, it is a state of material, social, and symbolic deprivation that impacts individuals' well-being and opportunities for social mobility.



# ISF Cambodia

## Cambodia

Many poor youths in Cambodia must work to help the family rather than attend school. ISF is breaking this poverty cycle by implementing a community-based approach that considers all of the young people's needs – from nutrition and transportation to school supplies and mentoring – to fulfil their education potential, complete their secondary schooling, and go on to university or stable employment.

# Poverty trap

*/'pɒv.ə.ti/ /træp/*

Refers to certain mechanisms that contribute to the perpetuation of poverty within a given society. According to proponents of this theory, these mechanisms (e.g., unequal access to education or financial services) reinforce an uneven distribution of resources and capital, which means that disadvantaged individuals or social groups remain in poverty and cannot escape it. Thus, the initial condition of poverty can be seen as the cause of a future state of poverty. This is underpinned and reinforced by structural and institutional factors (e.g., educational segregation or financial exclusion). The notion of the poverty trap may be applied not only at the level of individuals or groups but also to countries.

# Privatisation

*/,praɪ.və.taɪ'zeɪ.ʃən/*

Is a service transfer process from the public domain to the private sector. This entails that education, infrastructure, health, or other services previously provided by public agencies are now being supplied by private enterprises or organisations. Governments have been cautious in considering which services should be provided by public institutions and which can be transferred to the private sector to ensure that they are accessible to everyone in society. Countries around the world present different levels of privatisation of their services.



# Privilege

*/ˈprɪv.əl.ɪdʒ/*

Is the advantage that an individual or social group obtains based on specific social, cultural, and economic characteristics. Privilege is central to the social reproduction of inequalities because it allows advantaged individuals and groups to maintain their favoured position in society over time. Aspects such as wealth and education are essential markers of privilege today, although it also has historical roots in terms of gender, race/ethnicity, sexuality, and other social characteristics. The actions that different political, economic, or social institutions take are essential to open opportunities to disadvantaged people or groups, and break with discriminatory practices that perpetuate privilege in society.

# Prosperity paradox

*/prɒs 'per.ə.ti/ /'pær.ə.dɒks/*

Is a concept introduced by Clayton Christensen, Efosa Ojomo, and Karen Dillon, which suggests that while traditional approaches to development and poverty mitigation often focus on providing aid and resources to low-income countries or communities, these efforts can sometimes involuntarily perpetuate a cycle of dependency and hinder long-term sustainable development. It is suggested that sustainable development and poverty mitigation can be achieved by focusing on empowering local communities to generate their own economic opportunities, rather than solely relying on external aid. By encouraging innovation, investment, and the creation of new markets, countries and communities can break free from the cycle of poverty and inequality and achieve lasting prosperity.

# Quintile

*/'kwɪn.taɪl/*

Refers to any of five equal groups into which a population can be divided according to the distribution of values of a particular variable (e.g., income, wealth, social mobility). Quintiles are widely used in statistics and studies of inequality. For example, one of the most common ways to measure income inequality is to rank all households by income, from lowest to highest, and then to divide all households into five groups with equal numbers of people (or quintiles). Importantly, this calculation allows for measuring the distribution of income among the five groups compared to the total.

# Racialisation

*/'reɪ.fəlaɪ'zeɪ.fən//*

Refers to the process by which a social group is labelled and differentiated based on social-cultural factors. It is not inherent or biologically determined but rather a social construction that assigns meaning and significance to physical traits such as skin colour and facial features, as well as cultural practices and ancestry. Racialisation is evident in how a particular racial group is unfairly associated with negative traits and experiences, leading to discriminatory practices by institutions and individuals. For instance, ethnic minorities and indigenous communities in different contexts have been subjected to racialisation, which has resulted in various forms of discrimination against these groups.

# Relative Mobility

*/'rel.ə.tɪv/ /mæs'bil.ə.ti/*

Refers to the chances of people from certain class positions of attaining a particular income or occupational position relative to those from other class positions. For example, what are the chances of a working-class youngster ending up in an upper-middle-class position compared to a child brought up in an upper-middle-class position. If absolute mobility generally indicates that more people have moved out from the working-class than before, relative mobility indicates that the chances of people from working-class origins moving into professional occupations, compared with those from other positions in the class structure, are not much better than before. Thus, relative mobility, not absolute mobility, is the key indicator of equality of opportunity.

# Recognition

*/ˌrek.əgˈnɪʃ.ən/*

Refers to the action of acknowledging and valuing the person one interacts with as an equal, which entails social relations underpinned by respect and human dignity. Specific social movements and organised minorities, such as the LGBTIQ+ movement, have raised demands for recognition to make their culture and identities acknowledged, valued, and respected in a context in which they have been continually excluded and marginalised.

# Residential segregation

*/ˌrez.ɪˈden.fəl/ /ˈseg.rɪ.ɡeɪf.ən/*

Refers to the geographical distribution of social groups, particularly in relation to the zones, areas, and neighbourhoods where those groups reside. In areas where this distribution does not lead to diverse settlements, we speak of segregation. Thus, residential segregation denotes distance and separation between groups with distinct social characteristics such as class, race, or ethnicity, among others. Inhabitants of residentially segregated zones, areas, or neighbourhoods may confront unequal educational opportunities, which helps to reproduce privilege and social exclusion in society.

# School segregation

*/sku:l/ 'seg.rɪ.geɪf.ən/*

Is the condition in which pupils are unequally represented in schools according to their social and identity characteristics, and results in the separation of one social group from another. School segregation can be between schools or within one institution, and it may entail stigmatisation against minority groups. While school segregation was mainly caused by government policies and actions in the past, today it is more often the result of structural inequalities and lack of regulation. Social movements and diverse social actors have shed light on this problem, and some governments have put into action desegregation policies and initiatives to address the school segregation issue.

# Christel House

## South Africa

The youth unemployment rate in South Africa is over 50%. Born into poverty, young South Africans lack the perspective to build a life different from what they know. The goal is to providing, holistic education scholarships and bring together privileged and disadvantaged students to create long-lasting relations across the wealth divide, improving economic connectedness and mutual respect in South Africa.



# Social capital

*/'səʊ.fəl/ /'kæp.ɪ.təl/*

Refers to the friendships, acquaintances, or other social ties - used as resources by individuals, families, or groups to improve their social position in society. Social capital can serve both to reproduce class inequality and favour the process of upward mobility. Due to their greater size, status, or scope of their social ties, well-connected upper-middle-class parents, compared to their working-class counterparts, can typically provide major opportunities, information, and other resources to succeed in life to their children. On the other hand, the social support provided by universities to low-income students (e.g., mentorship) can be a vital resource for their successful social adjustment to higher education and to improve their chances of upward mobility.

# Social class

*/'səʊ.fəl/ /kla:s/*

Refers to individuals, families, or groups who share the same living conditions and socioeconomic status in a given society. Traditionally, societies include big class-based hierarchical groupings, such as the working class, the middle class, and the upper class. Nevertheless, societies can also include smaller or more specific groupings, such as the lower-middle class or upper-middle class. The concept of social class is widely used in censuses and in studies of social mobility.



# Social cohesion

*/'səʊ.ʃəl/ /kəʊ'hi:.ʒən/*

Refers to the extent of connectedness and solidarity among individuals, families, and groups in society. It stems from the goal to promote economic prosperity and the plurality of citizenship without undermining people's social ties and sense of unity. It reflects people's needs for both personal development and a sense of belonging to a community by linking together individual freedom and social justice, economic efficiency and the fair sharing of resources, pluralism, and common rules for resolving conflicts. To a large extent, social cohesion is dependent on reducing inequality and existing fractures in society.

# Social mobility

*/'səʊ.ʃəl/ /məʊ'bil.ə.ti/*

Refers to the movement of individuals, families, or groups throughout societies. It includes the possibility of moving up or down, not only in income distribution, but also in class position in society. An industrial worker who becomes a wealthy businessperson experiences upward mobility (also known as upwardly mobile people); an entrepreneur who loses everything in a sudden economic crisis experiences downward mobility (also known as downwardly mobile people). Factors such as educational background, occupational status, income, and wealth are closely tied with social mobility.

# Social reproduction

*/'səʊ.ʃəl/ /,ri:.prə'dʌk.fən/*

Refers to the various ways in which the existing social order is reproduced, renewed, and made durable. From a social mobility perspective, social reproduction refers to a situation where the possibilities of moving up are being limited. This condition is rooted in structural inequalities, which involve, among other factors, the unequal distribution of educational opportunities and the unequal allocation of wealth and economic resources. Those who are in dominant positions will try to maintain their privilege. For instance, schools and universities, by means of the transmission of particular cultural values, may help to maintain the privileged position of those in the upper class.



# Social stratification

*/'səʊ.fəl/ / ,stræt.i.fi'keɪ.fən/*

Refers to a phenomenon in which individuals and groups are hierarchically ordered into strata according to the resources and attributes they possess. These resources or qualities may be associated with education, occupation, gender, or ethnicity, among other social dimensions. In this scheme, the transition from one stratum to another is the effect of the loss or gain of socially valued properties, which implies downward and upward social mobility - respectively.



# FICA

## Brazil

FICA provides affordable housing for marginalised groups in Brazil. The work connects two extremes of society: low-income groups and privileged groups, who invest or donate towards the acquisition of properties and to facilitate social support for residents. FICA serves as a model for social landlords and national public policies.

# Status

*/'steɪ.təs/*

Refers to a socially defined position that an individual holds within a social system. Some statuses carry more social prestige, power, and privileges than others. Societies typically have a status hierarchy that places individuals and groups in positions of higher or lower social standing. For example, in many societies, doctors and lawyers are accorded higher social status than blue-collar workers. Status is often intertwined with power and prestige. Individuals with higher status often have more influence, authority, and access to resources in society.

# Stigmatisation

*/,stɪg.mə.taɪ'zeɪ.fən/*

Is the process by which an individual or group, immersed in a specific social context, is devalued, discredited, and labelled in terms of their differences and identity. Persons or groups in positions of power are often the ones who stigmatise disadvantaged people or groups. In the context of educational institutions, different minority groups, such as Latinxs (people of Latin American descent) in the United States, can suffer stigmatisation, which is at the base of significant social inequalities.

# Student loans

*/'stju:.dənt/ /ləʊnz/*

Are defined as an economic support scheme provided to students to pay for their education. Loan schemes may be particularly relevant in contexts in which education is not free or high tuition fees are charged. Loans are typically offered by governments, banks, or other financial organisations, and are designed to support students to cover the costs of tuition fees and living expenses while they are attending an educational institution. Once students finish their educational level or degree, they must return the money over a period of time and under particular interest rate conditions. High interest student loans can limit social mobility and change in wealth inequality by being a long-term drain on former students, especially those from precarious financial backgrounds.

# Sustainable development

*/səˈsteɪ.nə.bəl/ /dɪˈvel.əp.mənt/*

Refers to a development model that orients its actions to protect the natural environment while still creating wealth and promoting economic and social benefits. It involves applying different social and economic measures that seek to deal with problems related to global inequalities and the current environmental crisis. With these aims in mind, not only, environmental and economic indicators be monitored, but also those related to social conditions of life such as education, health, work, or participation.

# Territorial inequality

*/ˌterɪˈtɔːrɪ.əl/ /ˌmɪˈkwɒl.ə.ti/*

Is a concept that refers to unequal distribution of resources and opportunities between different regions within a country or across countries, leading to differences in outcomes for people living in those regions. For instance, in a country with significant regional economic inequalities, the more developed and urbanised areas may have access to better job opportunities, social mobility, higher incomes, and better infrastructure than the rural and remote regions.



# Transnational mobility

*/ˌtrænzˈnæʃ.ən.əl/ /məʊˈbɪl.ə.ti/*

Refers to the cross-border movement of individuals, families and groups, for instance, when individuals move from one country to another. Transnational mobility can affect social mobility trajectories. Examples include upper-middle-class individuals who need to move to other countries due to social crises. If they cannot find comparable employment in the destination country, their income and wealth could decrease - and they might join the lower-middle class or the working class.

# Transitions

*/trænˈzɪʃ.ənz/*

In the context of education, transition consists in passing through key thresholds within the educational system. The entry to preschool, the transition from primary to secondary school, and from secondary to higher education, are examples of these transition points, which become milestones within the individual's educational trajectory and life course. Phenomena such as school and higher education dropout, educational choices, and aspirations are fundamental aspects that link educational transitions with social inequality.

# Universal access to education

*/juː.nɪˈvɜː.səl/ /ˈæk.ses/ /tuː/ /,edʒ.əˈkeɪ.fən/*

Refers to the situation where all individuals are able to enter and participate in the education system, having equal opportunities - regardless of their gender, race, sexuality, class, disabilities, geographical location, family income, or school facilities. Education is considered a fundamental human right, yet currently, not everyone has the same opportunities to access quality education. Deprived people face different obstacles during their educational trajectories, which decrease their future employability and income and thus opportunities to build wealth.

# Baan Dek Foundation

## Thailand

Baan Dek provides children living in migrant workers' camps with access to quality education. It collaborates with companies from the construction sector to create ample and sustainable change. Previously left unattended in their camp, the children are now better prepared to enter Thailand's formal education system.



# Upwardly mobile people

*/ˈʌp.wəd.li/ /ˈməʊ.baɪl/ /ˈpiː.pəl/*

Refers to individuals, families, or groups who move upward in a given society. A typical example of upwardly mobile people is represented by the daughter of a secretary who becomes a lawyer working in a top legal firm. This upward trajectory is normally associated with a rise in earnings, but also the possibility of joining the upper-middle class or upper class.



# Vulnerability

*/ˌvʌl.nərəˈbɪl.ə.ti/*

A condition in which individuals or groups are exposed to increased risks due to social factors such as economic inequalities, discrimination, mental health issues, social exclusion, or lack of resources and support. It highlights how unequal distribution of wealth and income can create and perpetuate social disadvantages, leaving certain individuals more susceptible to various forms of distress and limited life chances.



# IIHS

## India

IIHS supports informally employed mothers by providing safe, sustainable childcare for their newborns and children. It builds collaboration among businesses, workers' rights groups, and unions. While previously the mothers returned to work two months after childbirth together with their baby, the children now receive age-appropriate, high-quality childcare and the mothers are able to balance work and care responsibilities.

# Wealth

*/weɪθ/*

Refers to the amount of resources (e.g., housing, financial, business) individuals, families, and societies own. Wealth is one of the key indicators of a society's overall level of prosperity and wellbeing. Wealth is typically accumulated over the years, sometimes including multiple generations, mainly in families and households. This is why, to a large extent, wealth is inherited.

# Wealth inequality

*/weɪθ/ ,ɪn.ɪˈkwɒl.ə.ti/*

Refers to how unevenly wealth, the amount of resources (e.g., physical, private pension, property, and financial) people own, is distributed throughout individuals, families, and societies. While income is earned by individuals on a monthly or annual basis, wealth is amassed over the years primarily in families and households. Therefore, changes in wealth inequality tend to take longer to manifest than those in income inequality. Issues around gender and race inequalities become invariably linked to wealth inequality and its transmission over generations. High wealth inequality can be a severe threat to economic growth, social and political stability.



# Wealth tax

*/weɪθ/ /tæks/*

Refers to a mandatory/compulsory contribution often imposed by governments on assets (e.g., housing, financial, business) owned by an individual, family or a company. As with other types of taxes (e.g., income tax), a wealth tax can serve to raise revenue for governments and it can be used to tackle wealth inequality.

# Widening participation

*/'waɪ.dənɪŋ/ /paː.tɪs.ɪ'peɪ.fəʃn/*

Refers to the process by which underrepresented groups in sectors like education (e.g., women, working-class, or ethnic minorities) are addressed with the aim of promoting and increasing their participation in the sector. Different countries have implemented specific agendas, policies, and initiatives to address participation issues and bring more opportunities for access to excluded groups. Yet, widening participation should not only involve issues of access but also of retention (keeping underrepresented groups in the sector), which may entail emotional, material, and economic support.

# Xenophobia

*/ˌzen.əˈfəʊ.bi.ə/*

Refers to rejection, hostility, and sometimes fear from individuals, families, and groups towards people from other nations, cultures, and ethnicities. Groups that have xenophobic attitudes are often associated with lack of knowledge of different cultures, behaviours, and features. Most societies are multicultural and plural with a diversity of races, religions, and ethnicities. Typically, xenophobia is aggravated when individuals, groups, and societies experience insecurity, lack of economic growth, and lack of social and political stability. Individuals who are victims of xenophobia have more difficulties (e.g., restriction to apply to certain jobs) to increase their income, to accumulate wealth and to find better occupations, which negatively affect their upward mobility.

# Youth unemployment

*/ju:θ/ /ˌʌn.ɪmˈplɔɪ.mənt/*

Refers to the proportion of young people (15-24 years old) who do not have a job at the present time but are actively looking for one. High youth unemployment occurs when there is a mismatch between supply and demand in terms of educational level, when a country's economy cannot provide enough suitable jobs and when there is a lack of public policy that can facilitate employment. According to the Organisation for Economic Co-operation and Development (OECD) Greece, Costa Rica, Spain, and Italy were the OECD member countries with the highest level of youth unemployment by 2022. Youth in these countries have a higher chance of experiencing downward social mobility due to the scarcity of job opportunities for young people.



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