

Balancing the Budget through Social Exploitation: Why Hard Times Are Even Harder for Some

John Tropman, Emily Nicklett

School of Social Work, University of Michigan, Ann Arbor, USA
Email: tropman@umich.edu

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In all societies needs and wants regularly exceed resources. Thus societies are always in deficit; demand always exceeds supply and “balancing the budget” is a constant social problem. To make matters somewhat worse, research suggests that need- and want-fulfillment tends to further stimulate the cycle of want-seeking rather than satiating desire. Societies use various resource-allocation mechanisms, including price, to cope with gaps between wants and resources. Social exploitation is a second mechanism, securing labor from population segments that can be coerced or convinced to perform necessary work for free or at below-market compensation. Using practical examples, this article develops a theoretical framework for understanding social exploitation. It then offers case examples of how different segments of the population emerge as exploited groups in the United States, due to changes in social policies. These exploitative processes have been exacerbated and accelerated by the economic downturn that began in 2007.

Keywords: Social Exploitation; Social Surplus; Elderly; Policy

Introduction

The year 2011 brought to Washington, D.C. a new Congress, ushered in by calls for budgetary responsibility, budget alignment, and spending reduction. That those who voiced such demands belong to the group that—from the perspective of many—created budgetary difficulties is a complex circumstance that, itself, requires interpretation. In this paper, though, we seek to move beyond political discourse. Our purpose is to examine the socioeconomic mechanisms of privilege and oppression that fuel inequality, funding misallocation, and debt.

The “Bush Tax Program,” recently extended, and also called into question, demonstrates the exacerbation of privilege. Tax breaks for the wealthiest Americans and deductions for second homes or first home “McMansions” embody sustained privilege. But these breaks come with a bill: That is, they reduce the revenue available to meet the needs of the *polis*.

Simply put, federal policies that benefit wealthy Americans at the expense of tax revenue must be paid for. That bill can be paid—that is, resources to care for society can be gathered—via government debt. It can also be paid with the currency of social exploitation—securing labor from population segments that can be coerced or convinced to work for free or at below market compensation. It is this payment mechanism that we explore here.

Social Policies: Closing the Gap between Needs, Wants, and Available Resources

We approach this topic from the premise that, in all societies, members have needs and wants that—collectively—regularly exceed available resources in both an absolute and a relative sense. All societal subunits, whether governments, organizations, families, or individuals, at every level of collective life, fight “the battle of the budget,” struggling to balance needs and

wants with resources. How have societies historically achieved this balance?

Thrift, or frugality, is one of a host of principles by which individuals and groups balance resources and desires. Trimming needs and wants to align with available resources is a time-tested, if infrequently used, approach. A number of scholars (Yates & Hunter, 2011), have explored in detail patterns of thrift and frugality in American history. Formal organizations promoting thrift played a significant role in balancing wants and resources during difficult periods of history. The American Society for Thrift, for example, encouraged gardening in school. The food produced from these war-gardens added \$850,000,000 of food to the World War II wartime supply (Straus & Kirby, 2005: p. 71). The hidden thrift in this historical movement is now remembered as part of the “Victory Garden” movement during WW II. The current trend toward “simple living” subcultures exemplify the aphorism, “live simply that others may simply live.”¹ These American patterns followed widespread thrift movements across Europe. More than 100 thrift (“Friendly”) societies developed across England and Scotland between 1850 and 1900. As Sir F. Eden (1979) recounts:

“Comforts of the laboring classes who belong to them, as will be evident from comparing the conditions of members and those who, in the same village, are content to rely on the parish for relief. The former are generally comparatively cleanly, orderly, and sober, and consequently happy and good members of society; while the latter are living in filth and wretchedness, and very often, from the pressure of casual sickness or accident, which incapacitates them from working, they are tempted to

¹“Simple living” is discussed at <http://communitybuzz.ic.org/2008/08/25/cnn-simple-living-and-eco-communities/>

commit and improper act (not to say crimes) against which the sure results of a benefit club would have been the best preservative.” (quoted in Straus & Kirby, 2005: p. 78).

Such friendly societies were not a form of charity; rather, these organizations aimed to conserve resources at community and societal levels. With such strategies came positive externalities such as individual benefits—among them the establishment of savings accounts for the poor.

Debt, borrowing money to meet present needs and wants, is, of course, another approach to balancing resources with needs. Arguments about whether societies should employ debt or thrift to secure their needs and wants are at the heart of the most recent European fiscal crisis that reached a crisis point in late 2012. While German policy reflects a frugal, thrift-oriented approach, Greece, Italy, Spain, and Portugal have relied heavily on a debt-oriented approach. These examples are current in 2011 but are also symptomatic of a more general problem. One way to close this gap between needs and resources, John Kenneth Galbraith (1985) contended, is through the accumulation of debt, which exploits future generations by shifting the burden of cost to them.

Another possible approach to balancing resources and desires is economic “equality,” in which all members of a community or society share equally in gains and losses. For example, all employees of a corporation take a \$1000 reduction in salary to assist the corporation in balancing its books during a particularly difficult quarter or receive a \$1000 bonus during a particularly fruitful quarter.

“Equity,” not to be confused with equality, is another possible alternative to the budget question. Equity employs a balancing principle to *differentially* allocate resources. In an equity scenario, the employees of the same corporation would take a 10 percent raise to allocate the excess resources of a profitable quarter or a 10 percent cut in an unprofitable one. The typical pay increase based on percentages is an equity adjustment.

In an equity adjustment, those who make more money get more money; those who earn less get less. But equity may be an upward sloping-curve as well. In some respects an upward-sloping curve represents the American tax system. Individuals and families with smaller incomes pay a smaller proportion of those incomes in taxes. Indeed, questions of equity are at the heart of many fiscal debates raging in early twenty-first century America. In the much-debated “Bush tax Program,” wealthier portions of the population pay a smaller proportion of their income on taxes, and firms and other organizations are not taxed equally. The “tax millionaires and billionaires” movement asserts that those with vast wealth should pay considerably more than they currently are.

Need for resources could be a criterion for budget adjustment as well. A need-based approach is similar to the Catholic concept of “preferential option for the poor.”² This alternative is best expressed by the old Marxian phrase “From each according to his abilities to each according to his needs.” The problem, of course, is that *needs* are hard to define, and an individual’s appropriate contribution to those needs even harder. For this process, families, groups, and whole societies require a complex bureaucracy to determine the level of need. This is further

²For more information, see “An Introduction to Catholic Social Thought,” <http://socialconcerns.nd.edu/mission/cst/cst4.shtml>.

complicated as there is a large financial incentive to demonstrate higher or lower levels of need depending on the political positions of various groups.

Other balancing policies exist, though any policy advantages some members of a society or societal subunit and disadvantages others. Often, a mix of balancing approaches can provide a practical solution.

However, the option that seems most popular in American policy-making in the first part of the twenty-first century is an approach examined in detail in *The Winner Take All Society* (Frank & Cook, 1995). It might also be called “for those to whom much has been given, more shall be given.” The “preferential option for the well-to-do approach” to balancing the budget provides more for the socioeconomically privileged and less for the socioeconomically marginalized. The mechanisms through which society selects those who have less, and secures their acceptance of that role, is the process of social exploitation.

Social Exploitation

Social Exploitation as Social Policy and Practice

We define social exploitation as the creation and maintenance of social and cultural structures that result in population segments contributing their labor for free or for very little compensation. Societies at varied levels of complexity, in varied cultures, during all periods of history have used varied expressions of social exploitation to balance resources and needs. Slavery (Smith, 2006), child labor³ lower wages for women,⁴ and temporary contracting of international labor⁵ are four of the most prominent social exploitation structures.

Social exploitation also occurs through cost shifting—arranging for others to bear part of the cost of a product, service, or advantage. Cost shifting most commonly occurs when organizations are not required to pay the full cost of their products. For example, heavy industry seldom bears the full cost of reclaiming the environment from carbon emissions, dumped waste, or improperly reclaimed strip mines.⁶ In the case of temporary international labor, host cultures do not always assume full responsibility for educating the workforce or for the social costs of healthcare and retirement once the workers become elderly. The society is also able to avoid providing many of the same societal benefits for “guests” to which citizens are entitled, despite taxation and other economic contributions that guest workers make to the host culture’s economy.

While debt is a form of cost-shifting social exploitation whereby the burden of current consumption is shifted to future generations, cost shifting also occurs at the “back end” of product life, when the company producing a product abdicates responsibility for the product after the sale, shifting all respon-

³Child Labor Education Project, www.continuetolearn.uiowa.edu/laborctr/child_labor/about/us_history.html.

⁴An Analysis of Reasons for the Disparity in Wages Between Men and Women. Consad Research Group. www.consad.com/content/reports/Gender%20Wage%20Gap%20Final%20Report.pdf.

⁵The United States’ Bracero program (1942-1964) and Western Europe’s guest-worker programs (1960s and 1970s), which fueled agriculture and industry, respectively, are two primary twentieth-century examples.

⁶Minnesota Sea Grant Report. www.seagrant.umn.edu/newsletter/2005/06/readers_want_to_know.html.

⁷But European Union policy requires the manufacturer to dispose of the vehicle at the end of its life (Koonz, 2009).

sibility to the owner with the sale.⁷

Social exploitation has been both directly and indirectly chosen to address the needs/wants-versus-resources” question and has, in many cases, become an operational practice. Policies supporting slavery, military draft, and fractional compensation to social agencies for child welfare cases are directly chosen means of social exploitation.⁸ Exploitative policy, however, must not result from action; as with human rights violations, legislatures, juridical, and executive bodies fail to undertake appropriate preventative or remedial action, permitting exploitative policies or practices to take root and remain in place.

Social Exploitation in the Literature

The gap between needs and wants and available resources is created, maintained, and even accelerated through specific social and cultural mechanisms. Most critiques of modern society, whether implicitly or explicitly, discuss social exploitation and the socio-cultural mechanisms that create, maintain and accelerate it. In this review, we focus primarily on the Marxist, evolutionary, and neo-Marxist critiques of social exploitation, though we begin by referencing two philosophers who employ diverse approaches to the question.

Alan Wertheimer in *Exploitation*, does not believe he “has much to add” and does not feel, in any event, that “... the moral core of the Marxist view is ... unique to Marxism.” (Wertheimer, 1996: p. x) Ruth Sample in *Exploitation: What it is and Why It is Wrong* (2003) makes two, possibly more nuanced, arguments: First, not everyone who gains disproportionately is necessarily an exploiter. Second, situations in which there is mutual gain can still be exploitative if the actions interfere with human flourishing (exploitation as degradation).

Wertheimer, in line with Marxist, evolutionary, and neo-Marxist scholars, takes the position that exploitation occurs when someone pays a nonstandard price. He explores, among other relationships, the possibility of social exploitation of student athletes, commercial surrogates, psychotherapy patients, and those participating in “unfair (where one party has a clear, and sometimes secret, advantage) transactions.” His book includes no fewer than sixteen example definitions of exploitation (Wertheimer, 1996: pp. 10-12.) Sample, working from a constructive viewpoint, argues that “... exploitation occurs ... when the value of a being—particularly a human being—is not being recognized.” (Sample, 2003: p. xiii). She further notes that her view “... is compatible with the idea that many things other than humans, such as landscapes, systems, and works of art, may be exploitable” (Sample, 2003: p. xiii).

Karl Marx (1902), however, explored social exploitation by positing political-economic theories of class conflict and working class exploitation. These have proven some of the most influential in recent history. Marxian political economy, at its core, addresses appropriation of surplus value in the system of capitalism (Caporaso & Levine, 1992). In *Kapital*, Marx (1867, 2007) argued that capitalism led to ever-increasing levels of production; therefore, ways of assimilating the surplus value from that production must be developed or the economic system would stagnate. Thus, as Marx saw it, the initial growth inherent in a capitalist mode of production perpetuated a system in which production could never equal consumption and the budget would never balance. Inherent in this system, he as-

serted, would be an eventual decline of land-rents, profit rates, and other aspects of capitalism. In neo-classical economic theory, self-interest and individual preferences drive markets, and formal (and informal) economies to develop, facilitate, and order that process. But “for Marx, causation [ran] in the other direction” (Caporaso & Levine, 1992: p. 56). That is, Marx viewed capitalism not simply as the manifestation of the power of markets; instead he understood it as an economic system built with the goal of assimilating surplus value to promote social reproduction of the capitalist system (Harvey, 1978), and the accumulation of wealth for the capitalists who controlled the means of production.

Thorstein Veblen (1899) suggested that social exploitation emerged from the evolutionary need for “conspicuous consumption.” Veblen did not suggest a massive program of social exploitation per se, but he posited the emulative social mechanism of spending to impress others and to therefore maintain one’s position in the social hierarchy. According to Veblen, that need eventually became a driving force to “need” more resources, which fomented the “revolution of rising expectations.” Following on Veblen’s theory, John Kenneth Galbraith, in his seminal work *The Affluent Society* (1958), theorized that consumption—instead of satiating an individual’s wants and needs—actually generates more wants that seem as important as those already supported. Furthermore, such a driving compulsion to consume, Galbraith argues, led the United States economy to be completely centered on expanding production and consumption, which causes needs and wants to regularly outstrip available resources. Robert Frank takes up Veblen’s “conspicuous consumption” thought in *Luxury Fever* (1999).

In *Regulating the Poor*, Piven and Cloward (1977, 1993) provide a neo-Marxist account of social exploitation in the United States. They begin their analysis by summarizing America’s shifting economic structure, because they believe that the true goal of poverty relief is to moderate recurring crises caused by capitalism (Piven & Cloward, 1993). In their view, capitalism depends on a large supply of cheap labor easily exploited for the gain of those in power. Instead of alleviating poverty, relief or welfare programs pacify exploited populations just enough to quell unrest, thus perpetuating the exploitative economic system. Power holders, they posit, may use repressive measures that beat the poor back into submission, or they may enhance welfare benefits just to the point where protest subsides. Additional Neo-Marxist “poor-controlling” perspectives are explored in Wacquant’s *Punishing the Poor* (2009) and Schoss, Forting and Shram’s *Disciplining the Poor* (2011).⁹

What categories of social exploitation exist in society and in relationships? By what mechanisms are these categories implemented? While exploitation as such can extend beyond persons to animals or the environment, social exploitation refers to the unjust use of persons. For purposes of this inquiry, we limit our examination of social exploitation to those categories reinforced in a societal context, rather than particular instances imposed by individuals, firms, or other institutions. This perspective locates the actions of societal subunits—individuals, organizations, and communities—as *within* the larger social system. Acts of exploitation in these subunits of society could demonstrate societal-level desires to continue social exploitation or societal-level failures to reduce exploitation in practice.

Specifically, we explore social exploitation as attempts by

⁸www.kpbs.org/news/2011/jun/15/california-repeatedly-resisted-foster-parent-reimbursement/.

⁹See the authors’ research project site and related publications at www.uky.edu/~rford/fla_project.html.

societal power holders to meanly, unjustly, or inequitably capture the labor of individuals or groups. We refer particularly to the use, or exploitation, of persons in an attempt, through the exploitative capture of their labor, to narrow the gap between perceived needs and available resources by reducing the cost of the need and of need-fulfilling services. Several writers and historians have been instrumental in shaping the direction of this inquiry.

In his argument for a residual welfare state, Goodin defines exploiting a person as “taking advantage of some peculiar features of that person and his situation” (1988: p. 124). He observes that opportunities for exploitation crop up naturally from unequal interactions in the free market, and asserts that a welfare state is the only way to protect both the integrity of the market and the exploited (as well as those vulnerable to exploitation).

Zinn (1999) offers a popular account of American history as the struggle between those who hold power and those who do not.¹⁰ He highlights many examples of social exploitation, and the range of exploitative mechanisms in American history, beginning with Columbus’s exploitation of Arawak men and women upon discovery of the new world. Others detail the long history of social exploitation of African Americans, Native Americans, Latinos, and other people of color in the United States. Indeed, America has not yet come to terms with the fact that many obvious symbols of our democracy were built, at least in part, by exploited and enslaved laborers (Ellis, 2004; McCollough, 2002). The United States’ legacy of social exploitation also includes encroachment into established Native American lands, as well as land practices in the now-southwestern United States. The reparations movement continues to demand that descendants of historically exploited groups receive compensation for their exploited labor and loss. Scholars have calculated astronomical compensatory sums that indicate the immense debt the federal government owes to just one group of exploited persons (America, 1990; Browne, 1993).

There are three major methods by which socially exploitative activities are carried out in societies: force, inducement, and cooptation. When force is applied, an individual is coerced into providing services.¹¹ In the case of inducement, an exchange occurs—albeit an unfair or socially inequitable token in return for services or products.¹² In social cooptation,¹³ an individual is convinced to give his or her services free of charge.

None of these mechanisms works independently from the others, and in many cases multiple methods have been, or are being, used to socially exploit. However it is useful to isolate the different mechanisms in order to more fully understand them.

Social Coercion

Social coercion, or force, is perhaps the most familiar form of exploitation, and slavery is perhaps the most familiar form of

social coercion. Not only has slavery had a long record in human societies, but it has also served as an important mechanism by which dominant aggressors secure free labor from subjugated victims. The need for labor is a societal pressure that strains available resources, prompting the generation and perpetuation of slavery or slavery-like institutions.

The United States continues to contend with its own legacy of slavery, most obviously of black Americans. The enslavement of black Africans on American soil from the seventeenth century through the mid-nineteenth century illustrates how social exploitation can perpetuate an otherwise inefficient system of production. Specifically, some prominent eighteenth century plantation owners recognized, and some scholars have argued, that the institution of slavery perpetuated a planting system, based on a few crops, that was otherwise inefficient in both labor and natural resources (Dowd, 1958; Genovese, 1965; Ellis, 2004). Child labor, the abusive employment of younger workers, is another form of social exploitation, though it changed dramatically with arrival of the Industrial Revolution. Before the Industrial Revolution, at least in the United States, children were seen as a necessary form of labor, and children in the family were laborers in a very immediate sense (Glass & Estes, 1997). However, it is hard to classify such behavior as always exploitative. It becomes exploitation when the *child* is considered and treated as *source of labor*, and the benefit of that contribution does not accrue proportionally to him or her. The transformation to industrial employment must be understood within the family context. In America’s early industrial years, the family labor model was simply transplanted to the factory; families commonly worked in the same factory, completing different tasks, as they had in a domestic setting (Glass & Estes, 1997).

Over time, conditions deteriorated and production expectations increased. The ensuing brutal conditions and long hours in these factory environments made working in factories far more dangerous, dirty, and inhuman than farm labor ever was. (Glass & Estes, 1997).¹⁴ The exploitation of children became commonplace, as they were forced to work very long hours in toxic environments, and faced physical and emotional abuse (Humphries, 2003). During the Progressive Era, especially in the emerging field of social work, many of the settlement house movement’s “founding mothers” focused on minimizing the exploitation of children (Trattner, 1989).

Child labor remains a major form of social exploitation. While strict labor regulation has curtailed its presence in the United States, it continues around the world in the form of factory work, enslaved labor, sexual exploitation, and human trafficking.

Social Inequity

A second mechanism of social exploitation is unequal or disproportionate exchange. Here individuals are not forced to give their services for “free,” but neither do they receive fair market value or necessarily a sustainable wage. Wage discrimination—due to gender, race, religion, or other characteristic—is a classic case of exploitation through social exchange. Individuals are paid less than going market rates for work, thus lowering the cost to the exploitative perpetrator of the product or services. Usually, Goodin (1988) contends, unequal ex-

¹⁰Zinn’s book has been criticized for factual errors. However, his overall perspective seems useful here.

¹¹A historical example of the use of force as social exploitation is provided by Mamdani (1985) in a description of colonialism, forced labor, and disaster prevention in Africa.

¹²Whether or not a given exchange classifies as inducement—and subsequently social exploitation—is a subject of debate. See Macklin (1988) for a discussion of surrogate motherhood.

¹³For a classic discussion of economic exploitation and deprivation of youth in the military through cooptation, see Sperber (1970).

¹⁴Such reforms were underway at least fifty years earlier in England (Shaftesbury’s Children Employment Committee, 1842). See Bready (2006).

changes occur because marginalized people or groups have no leverage to enforce just exchanges. They must work and interact in the market, but they lack the power to protect themselves from exploitation.

Unequal exchange also manifests in group and job diminishment, in which sexism, ageism, and racism (to name but a few of the many *-isms*) diminish the self-worth of individuals or groups. McIntosh argues that “privilege simply confers dominance, gives permission to control, because of one’s race or sex” (p. 77), thereby allowing whole populations to be marginalized (McIntosh, 1992). Such diminishment often sets the stage for social coercion or unequal exchange. If, for example, women are socialized to believe that they are less capable than men at certain tasks, then, individually and collectively, they will most likely not be able to secure a fair market value for their services.

In other situations the job itself is diminished, thus undermining the ability of workers to secure adequate compensation for their labor. For example, fields of work are *gendered* and, thus, marginalized. Hochschild’s study of flight-attendant training (1983) provides one example of job diminishment. Even though “emotion work”—an important component of work often done by women—is central to the functioning of the system (in this case, the airplane), it is devalued because it is gendered female. “Women’s segregation into jobs that pay less than men’s jobs and the undervaluation of women’s work” are well-documented phenomena in historically female occupations such as social work and social work education. (Kalleberg, Reskin, & Hudson, 2000: p. 261; England, Reid, & Kilbourne, 1996; Chambers, 1986).

“Guilty contributions” are a somewhat different form of socially exploitative exchange, in which individuals are paid for a job, perhaps even adequately, but they are induced to feel they should contribute more time and energy than they are being paid for. The workaholic is a perfect example of such an individual. Although workaholicism may indeed benefit the workaholic, and psychological reasons for the individual’s behavior may exist, the social ramifications of this behavior cannot be overlooked. In fact, some suggest that the United States’ economy in particular is structured so that contemporary workers feel compelled to work long hours, beyond what is necessary, to protect against an uncertain tomorrow (Riech, 2001).

The individual workaholic may view these overages as a risk investment, hoping that more time investment today will reap future rewards. But on an aggregate basis this risk investment operates as a source of social exploitation and a generative center for organizational wealth. If, for example, all employees of a firm work fifty hours a week instead of forty to achieve a promotion but only one promotional space exists, only one worker gets the job. However, the organization enjoys (though the employees may not) the results of ten extra hours from all workers.

Social Cooption

Social cooption is a socially exploitative mechanism that occurs when individuals are convinced, rather than forced or bargained with, to give their services inexpensively or for free. In many cases of social cooption, individuals or groups are co-opted into socially exploitative situations because of major structural changes in society. The change of early industrialization reshaped the experience of women for more than a century.

According to Hare-Mustin (1988), a “two-tiered production system has evolved in which the husband as breadwinner and provider works for money outside the home while a familial production system continues within” (p. 37). Industrialization and the birth of the family wage (Quadagno, 1990) redefined gender roles (Coontz, 1992; Glass & Estes, 1997) and marginalized women. These structural changes co-opted women into a new role of *helpmate* (Assmann, 2009), working hard but not receiving adequate compensation or recognition in the family or society. The social cooption of women is evident when they serve as primary informal caregivers to their spouses, parents, in-laws, and children. (A large proportion of caregiving, socially co-opted women also face social inequity in the formal work sector.) The cooption of women as caregivers provides strong cost-saving benefits at the expense of the wealth, health, and wellbeing of women who, in response to societal expectations, are placed in uncompensated and undervalued roles.

Gap Persistence

One might ask why the gap between needs and resources persists. It is apparently not the case that, in wealthier societies, increasing productivity narrows that gap. There appear to be several reasons for its continuing existence. Galbraith theorized that, in modern society, “the more wants that are satisfied, the more new ones are born” (1958: p. 125). Ever-increasing demand drives continuous expansion of production; instead of satiating wants, production compels people to further consume and demand. Such a driving compulsion to consume, Galbraith argues, has led to the U.S. economy’s focus on production and consumption. The whole system, it seems, is predicated on the quest to meet expanding needs and wants.

Related to the focus on production and consumption is the concept of *relative deprivation* (Samual Stouffer, et al., 1949; Vanneman & Pettigrew, 1972; Gurr, 1970; Walker & Pettigrew, 1984). That is, all societies are comprised of those who possess more and those who possess less. In a wealthy society, those not quite as wealthy as their peers may feel relatively deprived of the satisfactions of their needs when compared with wealthier peers. “One man’s consumption becomes his neighbor’s wish,” explains Galbraith (1952: p. 125). Relative deprivation, or “keeping up with the Jones,” may be a driving force in the lives of persons, and may incite the constant need for expanding production. Frank (1999) found that most Americans would rather make \$100,000 and have their neighbors make \$85,000, than to have their neighbors make \$200,000 and themselves \$110,000. Therefore, “relative income matters” (Wheelan, 2002: p. 114). That the needs and wants of some individuals are satisfied generates unfavorable social comparison to the rest of society and probably fuels constant demands for growth. As a result, the gap between needs and resources—at least partially fueled by the wealth of peers—persists.

The *decay of ends* also fuels the persistence of a needs-and-resources gap. As Merton (1968) observes, there is an interaction between means and ends. Needs and wants represent one kind of end. As a society grows richer, the wants faction grows, since basic needs are already met. But ends, once achieved, tend to decay. Disappointment sets in, and new preferences arise. Thus ends are indefinitely extended, and the gap persists. (Hirschmann, 2002).

Problems at the total resource level are compounded by distributive difficulties. Societies are rarely able to use the sum of

resources available. Institutional theory suggests that organizations within society hold onto procedures for undertaking tasks, commonly referred to as “myths and ceremonies,” long after they become outmoded (DiMaggio & Powell, 1983; Meyer & Rowen, 1977). These myths and ceremonies usually take the form of organizational or societal practices that lead to inefficiency. For example, in twenty-first century American culture, banks may refuse to lend though money is available because of ideas they have about “the market.” Families overspend at holiday time, because “that is what we do”. But both of these myths and ceremonies reflect cultural norms; inside the organization and in the society as a whole, they are retained and receive sacred status. Institutional theory of organizations further suggests that societal forces and expectations shape how organizations act internally (Scott, 1995). Thus, even though resources may be available their use may be constrained, or required, by cultural norms, further compounding the budget balancing efforts. Societal approbation of myths and ceremonies provides extrinsic legitimization for an organization at the expense of internal period task efficiency (Meyer & Rowan, 1977). However, societies cannot always capitalize on the available resources because inefficient practices have become sacred. While these myths and ceremonies are not necessarily socially exploitative, organizations’ quests for legitimacy often waste resources and exacerbate the needs/wants-versus-resources gap.

The free market, a powerful construct in contemporary American society, is another inefficient use of resources. As the ubiquitous “prisoner’s dilemma” and much of the collective action literature (Olson, 1965) illustrates, acting individually can, in some cases, lead to a worse outcome than acting collectively. It is usually in the immediate interest of any actor to act according to individual intentions. Thus individual action at the heart of the free-market system wastes resources. Such scenarios lead to market failures (Wheelan, 2002). For example, while it is in the interest of everyone to protect the environment, it is in the immediate interest of each firm to pollute. Doing so is cheaper in the short-run and could provide the polluting firm with a competitive advantage. In this way, acting on immediate self-interest produces a less-efficient use of societal resources than acting collectively.

While all societies show a predilection toward social exploitation, it seems that some societies are more exploitative than others. The prevalence of social exploitation can vary depending upon the socially achieved balance between *norms of sufficiency* and *norms of acquisition*. Norms of sufficiency focus on obtaining the amount of a good necessary to meet a base standard for a group of people. Such a framework dampens the grip of both relative deprivation and the need to consume. *Norms of acquisition* tend to support an endless round of activities and achievements, resulting in over-work.¹⁵

Achievement may best be thought of as *acquisition motivation* or *need-to-acquire* (Atkinson & Feather, 1966). No amount of money is enough; no amount of power, status, or reward is sufficient (Barnes, 2002).¹⁶ The achievement of any goal requires that it be set aside and the next goal established. When

an athlete runs a four-minute mile, then a three-minute, fifty-nine second mile becomes the next goal. This *acquisitive dominance* focused upon the production process usually requires insensitivity to humanity. “Inhumane” training schedules for the athletes striving to attain a three-minute, fifty-nine second mile represent a (usually self-inflicted) example. But the attempt to continually extend one’s power, influence, and wealth is often associated with insensitivity to the harm that these extensions inflict on others. Further, acquisitive dominance can be enhanced through social exploitation, creating an affinity between the two.

Social Exploitation as an Analytic Lens

Social exploitation is a useful lens through which to consider problems that are interconnected, though they might appear to be disparate or discrete.

As discussed above, the United States and its various societal subunits have a long history of social exploitation. Despite its record of social exploitation, the United States and various subunits within the United States developed a pattern of opposing exploitation (Meyer & Tarrow, 1998). In the second half of the twentieth century, United States’ society made important strides in disarming socially exploitative patterns.

The new, post-World War II affluence of the 1950s made exploitative social patterns clearer, enabling society and its subunits to identify the patterns and the possibilities for replacing them. The subsequent “rights revolution” of the 1960s generated cultural pressure to supplant exploitative centers within American society. During this rights revolution exploited groups asserted rights, most of which focused on aimed at stopping or curtailing exploitative activity of power-holding groups. Although social exploitation in the United States persists, society and its subunits have made tremendous strides toward mitigating exploitation and restoring the rights of previously exploited groups.

It became evident during and after this restorative process that restoring rights is an expensive undertaking. After all, exploitative patterns exist to secure inexpensive labor. When a society moves away from these patterns, it loses free or cheap labor and additional income.

Burgeoning personal debt accumulated in the United States since the 1980s, when viewed through the lens of social exploitation, can be understood as one tactic a society uses when the gap between needs and wants and resources becomes too great. It borrows, effectively shifting the exploitative debt burden to future generations.

The borrowing tactic, however, has many obvious costs, among them cost shifting to future groups and high debt that can curtail needed investments. (Opposition to this tactic surfaces periodically, as it did in the early 1990s, and as it may in the near future in response to the global financial crisis of 2007/2008.) Because a borrowing tactic shifts, but does not mitigate, exploitative societal patterns, American society needs new approaches that permit it to actually narrow the gap between needs and wants and resources, in effect to “balance the budget.”

Two general types of solutions are possible. One is to restrain needs and wants. This is a strategy that more thrift-oriented societies are likely to adopt, as evidenced in the current European Union currency crisis. In this circumstance, thrift-oriented societies such as Germany are able to balance

¹⁵Social comparisons influence subjective experiences. See Stouffer et al. (1949) *The American soldier: Adjustment during Army life*.

¹⁶Barnes (2002) argues that belief in American achievement ideology generally entails blaming underachievement on attitudinal or moral differences among individuals. Those who critique the achievement ideology generally point to institutional and structural forces as underlying some differences in achievement.

needs, wants, and resources. Other countries such as Spain, Portugal, Greece, Italy, and Ireland have been compelled to undertake mandatory “austerity” or adopt “balancing the budget” measures.

Given the current produce-and-consume socioeconomic paradigm in the United States, it is unlikely that American society will elect to restrain needs and wants. Absent a solution to this imbalance, it is possible that American society will continue to exploit vulnerable populations. For example, the U.S. economy depends on the labor of millions of undocumented immigrants who work for low wages (Sunn, Fogg, Harrington, Khatiwada, Trub’skyy, & Palma, 2002); lower socioeconomic-status persons still face discrimination and opportunity limitations that force them into exploited positions. Moreover, people of color or women in higher-status positions may continue to encounter exploited situations due to “last-to-be-hired, first-to-be-fired” discrimination. Professions dominated by women, and female workers in general, still face a serious compensation gap. The reasons behind these persisting inequalities are myriad, ranging from overt discrimination to structural differences in demographic groups.

The case study below illustrates how policy makers planning for the future can benefit from an understanding of social exploitation.

Case Study: The Elderly and Social Exploitation

Social exploitation assumes many forms. Individuals move in and out of socially exploitative situations as they engage in activities that are socially defined as “beneficial” or “a drain” to society. Wertheimer (1996) identifies such temporary groups as student athletes or financially motivated surrogate parents. Groups, however, are more likely to be exploited when they have a vulnerable social identity—especially one compounded by financial or political vulnerability. As argued by Sample (2003), nature, animals, and works of art are also vulnerable to social exploitation. Socially exploited groups are diverse; they are often targeted according to defined contemporary social problems. As a population group, for example the elderly are increasingly experiencing social exploitation, exacerbated by recent financial and population trends and combined with other such societal vulnerabilities as poverty or discrimination.

Since the 1935 passage of the original Social Security Act (P.L. 74-271, 49 Stat. 620), the elderly have been fairly well protected from exploitation (as measured by the number of elderly living in poverty) in the United States. Indeed, the poverty rate among the elderly dropped from 35 percent in the 1960s, to approximately 11 percent in the early twenty-first century¹⁷. The Center on Budget and Policy Priorities studies indicates that, in the absence of Social Security legislation, approximately one in two of America’s elderly, rather than one in eight, would live in poverty (Porter, Larin, & Primus, 1999).

However, a number of recent trends provide cause for concern about a possible rise in social exploitation of the elderly. The numbers above do not take the cost of healthcare into consideration—particularly medications which is estimated to double the estimated rate of poverty among the elderly. By 2030, the percentage of Americans over age 65 will increase from about 12.4 percent of the population to as high as 20 percent (Administration on Aging, 2005). Thus, by 2030, 70 million Americans will be considered elderly, more than twice the

number in 2000 (Administration on Aging, 2005). Under the weight of these numbers, the stability of social programs—most importantly Social Security, Medicare, and private pensions—will be placed in jeopardy (Hamilton, 1997). Exacerbating this possible problem, some data suggest, is the possibility that Baby Boomer retirees have not adequately saved for retirement (Stanford News Service, 1995), and unforeseen problems such as investment losses (stock market instability, falling house prices) could exacerbate this problem. Given these circumstances there is reason to project that many older adults will be forced to work at least part-time, introducing a new growth population in the labor force.

Elderly workers are stereotyped in many of the same ways as other marginalized populations. In fact, Nelson argues, “age prejudice in this country is one of the most socially condoned and institutionalized forms of prejudice, such that researchers may tend to overlook it as a phenomenon to be studied” (Nelson, 2005: p. 207; Palmore, 1999). Since the United States has a youth-centered culture, the elderly are in many cases regarded as less capable. “Older persons today are treated as second-class citizens with nothing to offer society,” and “these negative attitudes have persisted in our society, and have in fact, only increased” (Nelson, 2002; Nelson, 2005: p. 208).

Because the youth-centric culture views the elderly as less valuable, prospective employers may find it possible to offer them a lower wage. Assuming that those elderly who continue in the workforce are those in financial need, they may face the compounded discrimination of wages based on age and social class, race/ethnicity, or gender.

Data also suggest that such economic exploitation of the elderly could lead to further stratification along the same lines that currently exist. Specifically, if the predicted shortage of skilled workers materializes, it is likely that highly skilled seniors will continue to be a valued commodity in the labor force (Haider & Loughran, 2001; Atwater & Jones, 2004). But data suggest that even skilled elderly workers receive substantially less pay than they did when they were younger, due in large part to their preferences for greater flexibility (Haider & Loughran, 2001).

However, those elderly who find themselves at the bottom of the economic ladder (Haider & Loughran, 2001) can expect to find themselves employed in the fastest-growing jobs sector: low-wage service jobs, with few benefits and unpredictable schedules (Kalleberg et al., 2000). This segment of the elderly population will be especially vulnerable to social exploitation.

The elderly are vulnerable to social exploitation for multiple reasons. Age itself creates some vulnerability, as does the health of the elderly population, which is not as robust as the non-elderly population (Estes, 1983). Then, too, the elderly population is comprised of a higher percentage of women than men (Administration on Aging, 2005), creating a group susceptible to compound exploitation: elderly women. Finally, the group benefited from social legislation enacted in the late twentieth century. They enjoyed improvements in Social Security, Medicare, and Medicaid, and support of numerous state and local initiatives. Given these benefits, the elderly might, as a group, be convinced to relinquish its financial protections as American society balances its checkbook (which seems unlikely). However, these social benefits also demonstrate the political power of the elderly—especially as a large voting block. This political power which, in the twentieth century, made Social Security the “third rail” of American politics, does represent

¹⁷www.nber.org/aginghealth/summer04/w10466.html.

some protection from increasing social exploitation.

However, the older adult could nevertheless remain a target for social exploitation. What forms might such exploitation assume? Since the elderly are a politically powerful group, and society is more aware of exploitation than in previous generations, overt coercive exploitation is unlikely. Thus increased social exploitation may capitalize on elderly vulnerabilities in more subtle forms, stemming from major shifts in society's structural trends that lead to possible compromised positions.

Exploitation of the elderly seems to be growing in the area of kinship care. Kinship caregivers "are raising the children of their relatives, who for a wide range of reasons are unable to do so themselves" (Shaefer & Talley, forthcoming). Usually kinship care occurs when a grandparent raises grandchildren, for reasons that include death, incarceration, severe mental illness, abuse, or neglect on the part of a parent (McLean & Thomas, 1996). Recent trends suggest that foster care administrators find kinship care a preferable alternative to foster care placement (Testa & Slack, 2002). As this is more prevalent in the African American community, kinship care provided by (usually black female) grandparents is a mechanism through which inequality is exacerbated by social exploitation. Informal care giving for spouses is also highest among the elderly population, where both the provider and the recipient of care are likely to be physically disabled.

However, in most states, kinship caregivers receive no support for their wards. In many cases caregivers draw heavily on any financial resources have saved for retirement, leaving them in a financially precarious position (Shaefer & Talley, forthcoming). A case can be made that society is shifting the burden of parenthood onto grandparents of children who, in the past, have been entitled to foster care resources. While there is no overt exploiter, this can be understood as a type of social exploitation. Grandparents—who may already be socially disadvantaged—fill a role that is not inherently theirs, receive inadequate compensation, and have little room for claiming compensation given the moral construction of their undefined caregiving role as grandparents. These grandparents cannot access most of the usual supports provided to parents and are not even eligible for the services other parents could access. As elderly caregivers, they fend for themselves, while states save substantial resources they would otherwise expend.

Additional exploitation may come in the loss of promised benefits. Even with the political power the elderly enjoy, there is much discussion in the press about the cost of medical care, particularly the cost of medical care for older adults. Such discussion is ominous if not specifically prognostic. Of course it may be necessary to cut or restructure some benefits, in an effort to reconcile needs and wants. It may be important to adjust the tax system; to remove certain exemptions; to deal with rising medical costs. But when these changes are links in a larger pattern, a problem emerges. The elderly have enjoyed a protected status during the last seventy years. Will future changes endanger the protection they received in the twentieth century?

Conclusion

Social exploitation appears a common result of the universal gap between needs and wants and available resources, whether societal, organizational, familial, or individual. This paper builds a theoretical framework for understanding social exploitation, and discusses some of its forms, motivations, and applications.

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