Metaphors of Global Inequality

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Abstract

Metaphors are a powerful source of information for scholars as they devise theories of international relations (IR). Many of the assumptions that inform theories of IR and the conclusions drawn from them are premised on foundational metaphors. In the study of global inequality metaphorical categories frame the analytical debate. Global inequality has been conceived of metaphorically in a variety of terms including the concepts of “core and periphery,” “dependency,” “North and South,” and “developed and less developed states.” Even the term “global inequality” has metaphorical qualities. Each of these metaphorical constructions provide tacit information that influences the way the topic is studied and how explanations are formulated to explain relations between parts of the world with differing amounts of wealth. Critical interrogation of metaphors of global inequality can yield new information that may re-frame the problem of the distribution of wealth and re-formulate theories to explain its role in international relations.

Metaphors of Global Inequality

Of all the areas of international political economy that rely on metaphors to convey abstract ideas, perhaps the most interesting is the study of relations among actors of unequal wealth. This is for the simple reason that the very act of defining the relationship among these actors is fraught with difficulties of terminology and lexicon. As is always the case in any area of international relations theory (or any field of abstract study), it is possible to approach inquiry in this area using as literal, precise, and unadorned language as possible keeping in mind that no form of human communication is free from metaphors. Thus, one could study matters in this realm using precise and explicit terminology such as “relations among international actors of unequal wealth.” Of course, this term is not devoid of metaphors by any means— “among” employs a spatial metaphor, “unequal” uses a metaphor of measure, “actors” treats states and other international entities as individuals—but it tries to spell out an empirical subject matter without making reference to conceptual metaphors that imply more judgements about the factual data in question than the relatively straightforward metaphors that “among,” “unequal,” and “actors” do.[1]

Rather, as this paper will suggest, the competing metaphors that are involved in the definition of empirical concepts involve a range of metaphorical images, the meanings of which impart distinct judgements about the nature of relations among international actors of unequal wealth. Scholars face a number of choices when they put a label on any abstract concept. The difference between this area and other areas of international relations theory is that scholars seem to have been unusually conscious about the implications of whatever label they choose to describe the relations at hand. As we shall see, none of the choices that have been made about describing relations among international actors of unequal wealth have been entirely free of conceptual bias owing to the very way in which the field has been defined.

The Ordinal Worlds Metaphor

By the ordinal worlds metaphor I mean the terms “First World” and “Third World” (and to a much lesser extent “Second World”) that are used to refer to wealthy and less wealthy parts of the world. Numerical metaphors (including ordinal metaphors) are not found widely in international relations theory, although they are used in other areas of theory and practice such as physics and the law.[2] The term “Third World” was coined in 1952 in an article in *L'Observateur* by Alfred Sauvy. Sauvy based this term on the French concept of the “Third Estate,” that is the economic class comprised of the “commoners.” Having classified less economically advanced countries as “third” in rank, it was only natural that a “first” and “second” had to be defined. The “First World” came to describe countries of advanced economic development, while the “Second World” took on a somewhat different meaning applied to the Soviet-dominated communist countries. In this sense the term implies both political difference as well as economic characteristics.

The reason why “First World” and “Third World” qualify as metaphors and not literal expressions of how wealth and economic activity are distributed throughout the world is that there is no way to “count” which parts of the world come “first,” “second,” “third,” or anywhere else in a ranking of where wealth and economic activity are concentrated. These are merely convenient expressions meant to capture the way that on a scale of economic development certain areas are more advanced than others (although it should be noted that the terms “development” and “advanced” are themselves metaphors fraught with their own problems as the next section will explain). Obviously wealth is unevenly distributed throughout the world and economic activity takes place to various degrees and in varying types of economic pursuits (e.g., agricultural production, industrial manufacturing, the provision of services, financial transactions, etc.) and it is convenient to come up with some way of providing a scale that gauges these varying levels of wealth and economic activity. As simplifying terms go, "First World" and "Third World" appeal to people's ability to think in terms of ordinal rankings.

However it should not be surprising that such starkly oversimplified terms such as "First World" and "Third World" can obscure and mask the wide range and type of economic activity that results in unequal monetary distributions. As with the other metaphors that will be dealt with in this discussion (e.g., the "core" and "periphery" metaphors, "North–South" relations), "First World" and "Third World" provide spatial imagery that is at odds with the actual global distribution of wealth and economic activity. While the "First" and "Third" parts of the metaphor are ordinal in nature, the "World" terminology evokes a geographic place, that is, a self-contained universe or "world." Yet while wealth and economic activity can take physical forms, they are also abstractions that defy geographic boundaries. Money itself is simply an accounting principle—a store of wealth—and banking and financial transactions, increasingly electronic in nature as they are, are not constrained by physical borders. So to speak of distinct geographic "worlds" that are set off from each other on the basis of the distribution of economic transactions is a gross oversimplification.

Additionally, like the "core" and "periphery" metaphors and the metaphorical images of "North" and "South" discussed below, "First World" and "Third World" also imagine as homogenized that which actually is economically diverse. Within the seemingly coherent "First World" are communities that are deprived of economic benefits, while in the seemingly uniformly impoverished "Third World" there are areas of quite appreciable wealth. We can acknowledge, as is true for "core" and "periphery" and "North–South" relations, that "First World" and "Third World" are ideational conceptions of concentrations of economic activity, but as metaphorical images they cannot help but lead scholars to focus their analytical and research energies on literal parts of the world that are meant to embody "First" and "Third" world characteristics. Thus, the "First World" is commonly associated with places such as Europe and North America while the "Third World" is seen as a large portion of the rest of the world. A scholar who applied for research grants to study the "Third World" by examining the economic life of impoverished immigrant communities in, say, Sweden, would likely have to offer a more convincing justification for such a grant proposal than someone studying similar "Third World" economic phenomena in Mozambique. Such is the simplifying set of expectations that the "First World" and "Third World" metaphors create.

Ordinal rankings also can have the effect of suggesting quality in addition to mere numerical classifications. Someone who comes in "first place" in a contest obviously has done better than someone who has come in third. This is not necessarily the connotation Alfred Sauvy had when he coined the term "Third World" after the fashion of the French "Third Estate." Sauvy's intention was to make an analogy between the economic condition of certain countries relative to the wealthier and more industrialized countries to which they were compared. Nonetheless, proponents of economic development in the "Third World" have objected that the "Third World" label stigmatizes the regions and countries in question and assigns to them a status of inferiority. Such is the nature of metaphors; they bring meaning to a situation but they can also problemetize an issue or frame a concept in such a way that it is in need of a solution. It is for this reason that the "Third World" metaphor has been challenged in recent years in favor of ostensibly less pejorative linguistic constructions such as those focusing on "development."

Concerns about the connotations (both overt and subtle) of the ordinal worlds metaphor have been raised by scholars who specialize in this area. In the inaugural issue of the journal *Third World Quarterly* which debuted in 1979 questions were raised in a forum about why the term “third world” was chosen for the journal’s name over other possible monikers. As Leslie Wolf-Phillips (1979, 105) points out in that forum, when Sauvy coined the term “third world” in 1952 he did so in a Cold War context: “It may be that in the 1950s the phrase *tiers monde* was used more in the sense of ‘Third Force’ rather than ‘Third World,’ indicating ‘non-alignment’ rather than ‘underdevelopment’.”[3] Wolf-Phillips continues that this sense of the term has been verified by William Safire in his *The New Language of Politics* (1972) in which Safire supplements the “force” metaphor in “third force” with additional metaphorical imagery implying a meaning of political alignment rather than economic development. Safire defines *tiers monde* as: “Third Force:...a weight added at the fulcrum of the balance of power; a group of nations, or an ideology, between the communist and the western camps” (Safire 1972, 67 quoted in Wolf-Phillips 1979, 106).[4] Wolf-Phillips (106) observes that with the easing of some Cold War tensions in the 1960s and the emergence of newly independent countries as a result of European de-colonization *tiers monde* took on the new meaning of poorer countries relative to the industrialized world. It is interesting to note that as the shift took place from political alignment to economic status the metaphorical imagery associated with ordinal rankings also shifted from that of “force” to that of “world,” perhaps conveying that people associate politics with notions of physical capabilities as captured in the word “force” while the term “world” is associated more with notions that economic activity is physically contained within metaphorical “worlds.” Wolf-Phillips goes on to observe that as political alignment as expressed in the phrase “third force” was replaced by economic conditions as expressed in the phrase “third world” this led scholars and practitioners to experiment with alternate language such as that involving the metaphors of “development.”

Metaphors of “Development”

Metaphors in the study of relations among international actors of unequal wealth include the metaphorical expressions of “developed,” “less developed,” “developing,” and “least developed” regions, as well as the metaphorical concept of “development” and “underdevelopment” associated with the theories of the same name. In her historical review of terms referring to the “third world,” Leslie Wolf-Phillips (1979, 106) avers that the “phrase ‘under-developed’ was probably first coined ‘officially’ in the 1951 UN document *Measures for the Economic Development of Under-Developed Countries*” however the *Oxford English Dictionary* finds a reference in a January1949 speech by U.S. President Harry S. Truman in which he proclaimed “we must embark on a bold new program for making the benefits of our scientific advances and industrial progress available for the improvement and growth of underdeveloped areas” (*Oxford English Dictionary*).

As a literal expression, and in its simplest sense, the verb “develop” means “to bring from latency to or toward fulfillment” (*American Heritage Dictionary*, 511). The term can be applied to any number of processes, for example, it can refer to sexual maturity. In this sense, the term connotes a process of completion, and thus the same *American Heritage Dictionary* (ibid.) defines the adjective “developed” as “advanced in industrial capability, technological sophistication, and economic productivity.” Linguistically, then, the transition from the verb “develop” to the adjective “developed” represents a metaphorical application of a generic process to a specific quality associated with a discernible empirical realm.[5] The qualities of “fulfillment” associated with the verb “develop” are metaphorically applied to the realm of industrial production where they take on the new quality of “technological sophistication and economic productivity” (ibid.).

The metaphorical translation of qualities from the realm of processes to descriptors occurs with other definitions of "developed" as well. Secondary and tertiary definitions of the verb "develop" include "to expand or enlarge;" "to aid in the growth of; strengthen;" to improve the quality of; refine;" "to cause to become more complex or intricate; add detail and fullness; to elaborate" (*American Heritage Dictionary*, 511). As with the primary definition, these are largely generic processes. Yet when they are translated as an adjective in the term "developed" ("advanced in industrial capability, technological sophistication, and economic productivity") a metaphorical process has taken place that the qualities of one realm (processes of growing or coming to completion) are applied to a separate realm of industrial production and new meanings ("technological sophistication and economic productivity") are the result.

When it comes to researching the relationship between "developed" and "less," "under," and "least" developed regions, the implications of the metaphorical complications that arise when moving from verb to adjective become apparent. Whereas fulfilment or completion as processes can be value-neutral (the development from larvae to pupae in insects, for example, represents little more than an organic transition), developing "industrial capability, technological sophistication, and economic productivity" can be seen either as desirable or less desirable qualities. The *American Heritage Dictionary* (511) defines "developing" as "having a relatively low level of industrial capability, technological sophistication, and economic productivity." So as an analytical concept, the metaphor of being "developed" or underdevelopment" implies something about the desirability of certain qualities that the literal processes of the verb "develop" largely leave out.

Because the metaphor of "development" brings to mind improvements over some underdeveloped state of being, theories of development and underdevelopment typically proceed on the assumption that development is a more desirable state than underdevelopment. As I discuss elsewhere (Marks 2011), metaphors in human language frequently have the unintended effect of creating problems that must be solved. With regards to the metaphors of "development," clearly a state of development is seen as preferable to what is deemed metaphorically as "underdevelopment." Indeed, some scholars and practitioners have come to see the metaphor of "under-development" as a pejorative preferring instead "developing" or "less-developed" which implies room for improvement.[6] Using more literal language (or as literal as is permitted given the ubiquity of metaphors in human communication), one could describe the economic conditions of areas of the world with lesser amounts of economic activity and commodified wealth with any number of descriptive terms. One could say, for example, that they are based on "sustainable agricultural production in which a variety of crops are grown and stored to maintain the lifestyle and culture of self-supporting groups." Obviously this sounds less like a problem for both practitioners and theoreticians alike than if the situation is described metaphorically as "underdeveloped." Likewise, scholars and government officials probably would be far more alarmed about communities whose economic structure is based on (using literal description) "unsustainable commodified manufacturing in which wealth is expressed in terms of monetary instruments that are unequally distributed throughout society" than by a metaphorical description of a "developed" economy. As obvious as this observation sounds, it is worth reminding oneself regularly that theories such as those that apply to "development" can support only those hypotheses and predictions that can be imagined by the metaphorical concepts that inform their very assumptions. This is no less true for theories of "development" than any other area of study in international relations theory.

The implication that “development” follows a linear trajectory is perhaps an inevitable result of what Patrick Breslin (2004, 2) identifies as the mechanistic Newtonian metaphors that frame much of the theorizing about economic development, particularly in areas of the world where economic activity has not produced comparable forms of wealth as “more developed” parts of the world: “Given the pervasive influence of Newton’s paradigm, it was only natural that when attention turned, for a variety of reasons in the 1950s, to the problems of poverty in the poor countries, those problems, and assumptions about how to solve them, were understood within a linear framework. This way of thinking was reinforced by the success of the Marshall Plan—the first great experiment in fostering economic development.” For Breslin, the problem is obvious: Economic activity does not follow a linear logic of “development” which takes regions in poverty and inexorably transforms them into regions of wealth by way of a mechanical process of inputs and outputs as would be suggested through Newtonian metaphors of physics. Rather, what is more useful for Breslin (4–5) are metaphors of “chaos” and “complexity” which, while no less grounded in theories of physics, reflect the multitude of variables that can have an impact on outcomes. Breslin (6–7) writes: “To use the language of the new sciences, a development project is an intervention in nonlinear and complex adaptive systems. When it has been planned with linear methods and expectations, chaos theory suggests what can happen…What would a nonlinear development model look like? Metaphors from chaos and complexity studies suggest that it would look very much like what we call grassroots, participatory, bottom-up development.” Thus changing the language of development from metaphors of mechanical linear progression to chaos and complexity fundamentally alters scholars’ understanding of economic activity and the policies that bring it about.

A variation on the “development” metaphor is the metaphor of countries that possess high degrees of technological achievement or economic activity as “advanced” industrial societies. “Advanced” in this context is both a spatial and a temporal metaphor. As a spatial metaphor “advanced” implies something located further along a linear path (for example, one can “advance” a game piece in a board game with a beginning and an end; pieces that are more “advanced” than others are closer to the end of the game). As a temporal metaphor “advanced” suggests a state of being that has been around long enough to acquire qualities not possessed by actors or processes that have not achieved the same state (for example, one can speak of “advances” in understanding about scientific principles; these advances come with time since a new discovery advances a theory compared to what the theory was able to say given a limited knowledge base in the past).

As with the metaphors of “development” and its variants, the metaphor of “advanced” can lead scholars unwittingly to equate economic “advancements” with some sort of improvement. Consequently, use of the term “advanced industrial societies” can create the same sort of theoretical propositions as theories that are based on the assumptions of desirability of economic “development.” “Advancement” as a metaphor glosses over the details of economic activity that characterize metaphorical “advanced” industrial societies. Rather than being seen as spatially and temporally further along, literal descriptions of these societies would demonstrate that they simply have different characteristics than societies based on other forms of economic activity. Comparing different types of economic systems rather than communities that are more or less “advanced” is a qualitatively different theoretical endeavor than one that relies on metaphorical constructions for its starting point.

The Metaphors of “Core,” “Center,” and “(Semi)Periphery”

The metaphors of “core,” “center,” and “(semi)periphery” employ common spatial imagery to the study of relations among international actors of unequal wealth.[7] Literally, of course, countries and regions that represent the "core" or "center" of international economic interactions are not located at some definable site that can be located geographically at a polar point surrounded by a tangible "periphery." Rather, what is meant by these terms is that economic activity and wealth are concentrated within certain communities that exert economic and political control over global economic interactions.

The *Oxford English Dictionary* cites the first use of the term "periphery," meaning "the outlying areas of a region, most distant from or least influenced by some political, cultural, or economic centre" in Andre Gunder Frank's *Latin America: Underdevelopment or Revolution* (1969, 227) in which Frank contrasts the "periphery" to the "metropolis," which "sucks capital out of the periphery and uses its power to maintain the economic, political, social, and cultural structure of the periphery." Frank's "metropolis," a term invoking urban locations, was replaced by Immanuel Wallerstein with "core," for example, in Part I of Wallerstein's *The Capitalist World Economy* (1979) which focused on "the inequalities of core and periphery," while other authors substitute "center" for "core" (see, for example, Cardoso and Faletto 1979).

The obvious problem of the "core" and "periphery" metaphors (and their variations) is that clearly the world's geography does not indicate that there is any definable "center" of the world (leaving aside, of course, the earth's *geological* center within the planet's core). Land, sea, and the distribution of human populations simply do not form in such a way that economic and political communities form in concentric circles. Another issue involved with the imagery of these spatial concepts is the fact that those individuals who possess concentrations of wealth typically associated with the "core" or the "center" are in fact spread out widely throughout the world. Major urban areas associated with high levels of economic activity and wealth accumulation, for example, also typically harbor pockets of economic need. Likewise, countries that commonly are associated with the "periphery" can be home to economic sectors that are highly lucrative to those engaged in them. The so-called "*semi*periphery" presents the same problems of spatialization as it is difficult to locate portions of the world that are part- or half-way between the center and the periphery.[8]

Obviously scholars who speak of "core," "periphery," and there variations are not so naive as to think that these terms refer to geographic locations. These are clearly metaphorical images meant to connote concentrations of wealth, not clearly identifiable physical locations. These scholars would be the first to point out, for instance, that poor people in the richest and poorest countries of the world represent the global "periphery" despite being scattered throughout the world (just as "core" economic activity takes place in Paris and Dakar alike). So the purpose of this discussion is not to "disprove" the core–periphery thesis. Rather, the point is that, like all metaphors, the metaphors of "core," "periphery," and their variations bring to mind images that can invite misleading conclusions. Despite the fact that world systems theorists are the first to point out that "core" and "periphery" refer to instances of economic activity, the shorthand of the spatial images suggest avenues for research that involve empirical evidence of a geographically divided economic and political universe. Thus, it is not surprising that when researchers set out to study the "core" they focus on entire parts of the world (e.g., Europe, North America, Japan, etc.) that certainly do contain high concentrations of wealth but also pockets of poverty. Likewise, when scholars research the "periphery" they tend to focus on parts of the world (e.g., Africa, Latin America, large portions of Asia) that contain communities of little wealth but also centers of intense economic activity. Thus, "core" and "periphery" *do* tend to be associated with distinct geographic regions despite the fact that they are meant only to refer to institutions and people involved in economic activity and the concentration of wealth. In a world in which increasing number of economic transactions are conducted electronically, the geographic implications of the “core” and “periphery” metaphors are of decreasing relevance.

As Paul Chilton (1996, 62) observes, the “core” or “center” and “periphery” metaphors and their variations share some common traits with the “container” metaphor and its variants that are typically associated with states. The “container” metaphor envisions states as hard-shelled entities that are set off from one another. If there are any interactions among container-like states, they must take place across definable boundaries. “Core” and “periphery” also bring to mind the strict spatial imagery associated with the “container” metaphor. The “core” or “center” is what is on the inside of the global distribution of wealth while the periphery lies at the outer reaches. There is a distinct sense of division between the two. As is true for all metaphors, however, there can be multiple interpretations. Thus, while Chilton sees synergies between the “core,” “periphery,” and “container” metaphors that reinforce the fiction of state sovereignty, Ian Clark (1989, 44) argues that, in conceptualizations of hierarchy in international relations, “outside a statist perspective, [hierarchy] may be analysed in terms of centres or cores, semi-peripheries, and peripheries.” Thus, for Chilton the core-periphery metaphor is *evidence* of statist thinking, while for Clark this metaphor is an *alternative* to the statist point of view. These different types of analytical conclusions highlight the imprecision of metaphors in the development of useful theories.

The Metaphors of “North” and “South”

Interactions among international actors of unequal wealth also have been deemed metaphorically as “North–South” relations. This term is meant to refer to the fact that the majority of economic activity and wealth is located above the equator while lesser amounts of economic resources are allocated to regions further south.[9] In addition, the rhetorical division of the world into one of a "North–South" divide was in some respects a purposeful endeavor by leaders in the "South" to reorient the "East–West" conflict of the Cold War in order to rectify the economic exploitation and political marginalization of former European colonial states (see Berger 2004). However the expression also carries a metaphorical connotation since scholars who use this term explicitly assert that they mean to convey more than a literal geographic division of economic activity. Through this metaphor disparities in the global distribution of wealth are reduced to and imagined as a binary opposition between two distinct geographic poles.

As with the "core" and "periphery" metaphors and their variations, the "North–South" metaphorical imagery oversimplifies the complexity of the global distribution of wealth. Obviously, economic activity is unevenly located around the world and even within regions of relative economic wealth or poverty there are great variations within close proximity to each other. The terms "North" and "South" (curiously capitalized inasmuch as map directions typically are denoted in lowercase letters) suggest the same sort of compartmentalized images that the "core" and "periphery" metaphors imply in which there is little fluidity between two spatially separated realms. Just as north and south are fixed directions on a map, the metaphors of "North" and "South" in international relations theory suggest a permanent state of economic affairs. Furthermore, as polar directions, "North" and "South" imply a dyadic relationship quite possibly involving an oppositional component. The imagery also suggests a one-dimensional dynamic in that the relationship between "North" and "South" is defined on a linear axis.

The Metaphor of "Dependency"

Within the language of unequal international economic relationships there is the metaphor of "dependency." The *American Heritage Dictionary* (501) defines "dependent" as "contingent on another; subordinate; relying on or requiring the aid of another for support: *dependent children*." The same dictionary (ibid.) defines "dependence" as "the state of being dependent, as for support; subordination to someone or something needed or greatly desired; trust; reliance," and "dependency" as "dependence; something dependent or subordinate." Like all metaphors, the metaphor of dependency (as found most prominently in the theory of the same name) provides images with which to imagine a particular aspect of international political economy.

Generally speaking, and especially as depicted by Dependency Theory, the condition of dependency in international relations is thought of as an exploitative relationship between international actors of unequal wealth.[10] If the terms "dependent," "dependence," and "dependency" were used in their literal sense alongside additional descriptive terminology the connotation of exploitation would not necessarily be implied. As the definitions provided above indicate, conditions of dependence can be desirable because of the supportive qualities they offer. A dependent child, for example, is supported and sustained financially by his or her parents or guardians in what many if not most people would describe as a relationship of nurturing and care. In its most basic sense, something that is dependent on another is merely contingent on a certain set of circumstances. Therefore, in the generic sense, to be dependent is simply to occupy a position along a chain of cause-and-effect, as in a "dependent variable." A "dependent variable" in a causal chain of events is not being "exploited" by the independent or intervening variables that precede it.

The negative connotations associated with dependency in the study of international political economy demonstrate in part one of the perils of metaphors in international relations theory, namely, metaphors that are broad and with the potential for suggesting multiple meanings can be interpreted in any number of ways some of which reflect the personal perceptions of scholars themselves. Many of the broadest metaphors in international relations indicate this phenomenon. For example, the metaphor of "system" is used throughout international relations theory and differs in meaning from paradigm to paradigm. Because a "system" can mean many things, its suggestiveness as a metaphor is subject to multiple interpretations. The same is true with the metaphor of "dependence," the literal meaning of which has a variety of definitions. Since the term can mean a range of things literally, it is not surprising that its meaning as a metaphor is multiform. Obviously not all scholars are predisposed to see the relationship between an international actor of limited wealth with an actor of greater wealth as exploitative in nature, but since many do, the "dependence" metaphor gives them an opportunity to theorize this exploitation in a systematic fashion.

As typically constructed, the dependency metaphor depicts a situation in which international actors of lesser wealth are trapped in a permanently subordinate position because their choices are contingent on the economic advantages that international actors of greater wealth have over them. Cardoso and Faletto (1979, 22), for example, depict dependence in part as a situation in which local classes or groups in Latin America are involved in "enforcing foreign economic and political interests." In this view, the image that appears encourages scholars to quantify the extent of those economic advantages as opposed to other ways of measuring the relationship between the two sets of actors involved. For example, if a metaphorical picture of dependence emerged that highlighted the trust or reliance elements of dependence contained in the dictionary definition of this term, scholars might put more effort into measuring confidence-building institutions that make economic growth contingent on growing prosperity in both sets of partners. This is not necessarily to say that the predictions of Dependency Theory are wrong, but rather that with different metaphorical sense attached to them they would be based on analysis that triangulates a range of ways in which relations between international actors of unequal wealth are constituted and constructed. This requires examining the multiple ways that a broad metaphor such as dependence can be interpreted.

"Global Inequality"

Finally we come to the term "global inequality" which, when compared to other expressions discussed above, sounds less like a metaphor and more like a literal expression to describe what scholars envision when they use those terms. Etymologically speaking, however, even a the literal-sounding "global inequality" is metaphorical in what it imagines. In particular, the term "inequality" is a metaphorical way of expressing measurement for something that is hard to measure. Wealth is subjective. Obviously, we can discern *some* absolute measures of wealth such as the gross economic output of a country, per capita income, distribution of wealth throughout society, etc. But beyond that, how people measure their economic well-being, and how they judge whether or not the they have achieved a certain standard of living, depends on custom, culture, convention, and personal taste. It is not for nothing that Patsy Cline sang "And yet the hand that brings the rose tonight is the hand I will hold, for the rose of love means more to me more than any rich man's gold."[11]

In all seriousness, studies of global inequality are often built on the same assumption that metaphorically frames investigations into "North–South," "core–periphery," and "First World–Third World" relations, namely, the image of undifferentiated regions possessing wealth that can be measured in an absolute sense irrespective of how that wealth is defined or locally distributed. The metaphor of "inequality" presumes an ability to quantify amounts in ways that do not differentiate among different ways of measuring prosperity. A rich person in the year 1000 would be considered by the standards of the year 2000 to suffer a meager existence, lacking as it does the modern "luxuries" of electricity, indoor plumbing, and mechanized transportation, not to mention modern medicine and means for creating a reliably plentiful food supply. By the same token, in the contemporary world, conceptions of global "inequality" make little accommodation for differing standards of living that depend on custom, culture, and choice.

Furthermore, there is a linguistic bias built into notions of equality as applied to the social world. According to the *Oxford English Dictionary*, the meaning of the word "equal," as borrowed into English from the Latin root *æquā-lis*, connotes magnitudes and numbers that are "identical in amount; neither less nor greater than the object of comparison" and things that have "the same measure; identical in magnitude, number, value, intensity, etc." The *OED* goes on to explain that in this sense the term "equal" often is expressed "with latent notion of 'at least equal'; hence not equal to means usually 'less than', 'inferior to'." Here then lies the metaphorical notion of measure that frames the study of global "inequality." In matters of the distribution of wealth among all individual and corporate actors on earth (including states, other political divisions, and private organizations), equality is an impossibility and thus what frames the issue for scholars is a focus on the metaphorically imagined condition of those who have "less."

After all, in mathematics, in the expression 2 + 2 = 4, what is on each side of the equals sign may represent an *equal* amount, but it is not the *same*. Two plus two may *equal* four, but two plus two is not the *same* as four. They are separate and distinct numerical quantities. On one side are two sets of two; on the other is a single set of four. Cumulatively four equals the sum of two and two, but it is not the same collection of items as two sets of two are. For mathematicians this is not a "problem" as much as it is simply the solution to an arithmetic question. There is no expectation that what is equal is necessarily the same, let alone there be anything problematic about two quantities that are *unequal* in their amount.

For scholars of global "inequality," however, the impossibility of distributing wealth "equally" around the world is complicated by the "problem"that results from imagining that there can be equality and the reality that even if such equality could be achieved it would still appear "unequal" since it is unrealistic to expect that equality of wealth would be experienced the *same* on a global scale. "Inequality" thus becomes less a literal substitute for metaphors such as "North" and "South" and more a metaphor itself for the lack of sameness in how individuals experience wealth. However, as the math analogy above demonstrates, one does not necessarily expect a sameness where there is equality. For example, at one time the United States and the European Union represented roughly equal amounts of wealth. However, how that translated into economic opportunity was not the same. The United States, comprised as it is of a single economy, provides greater opportunity for the free movement of economic assets, including human labor. Although the European Union has made strides towards complete economic and monetary union, it is still comprised of separate economies that complicate the free movement of capital and labor. Thus, equality of wealth between the United States and the EU does not necessarily mean that economic circumstances are the same. "Inequality" is an invented "problem" just as "equality" does not necessarily provide a "solution."

To this, scholars of international relations would argue, of course, what is the purpose of studying something unless it is a "problem?" This is precisely the point. Academics who study metaphors have long noted that one of the functions of metaphors is to create in the minds of people "problems" that need to be "solved."[12] It is therefore not surprising that in many introductory international relations textbooks, the topic under discussion here is presented as the "problem of global inequality."[13] As the etymology of the word "equal" suggests, "inequality" is more than merely a numerical situation of two or more sums not of the same value, but a condition in which one thing is less than another.

However, the "problem" for most scholars of international relations actually is not "inequality" but economic deprivation, or better yet, poverty and, as Paul D'Anieri (2011, 305) points out, "poverty" and "inequality" are not the same thing: "In contrast to 'poverty,' 'inequality' is inherently comparative; in measuring inequality, the question becomes, 'How much wealth or income does one person have *compared to someone else?'* It is very possible that a person's income is growing, but more slowly than that of others. As a result, income is *increasing* but so is *inequality*. Does this mean *poverty* is increasing or decreasing?" (emphasis added). D'Anieri's observations and question are useful because they highlight the fact that while poverty may be measured in an absolute sense, inequality is inherently relative. Whether or not poverty or inequality are a "problem" depends on not only on one's perspective relative to one's own situation over time and to other individuals' condition at present but also on the perspective of observers who make their own determinations about what is a "problem." The "problem" of poverty can be solved by providing individuals who lack resources with additional resources that bring them out of poverty while the "problem" of inequality can only be solved *not only* by eliminating poverty but *also* by providing individuals with the same amount of resources providing they value them in the same way.

Used as a metaphor for conceptualizing any number of qualities of the human condition, “inequality” implies an undesirable situation that requires a solution that is unique from a separate undesirable situation—“poverty”—which can be solved in distinct ways. There are no intrinsically better ways for solving inequality versus poverty since they represent analytically distinct empirical problems. However, the metaphor of “inequality” privileges one way of thinking about a problem and thereby a set of solutions that emanate from it. The metaphor of “inequality” presumes what is missing from global economic interactions is an outcome of sameness as opposed to an outcome of improved economic conditions over time for any one individual which is suggested by the separate concept of “poverty.” Thus, not even the seemingly literal term “global inequality” resolves the dilemma of conceptualizing specific aspects of international political economy that are complicated by the other metaphors (e.g., “third world,” global “south,” “periphery”) that scholars employ in this area of investigation.

Concluding Thoughts About Relations Among International Actors of Unequal Wealth

In addition to the common metaphors discussed above there have been other metaphorical images that have been attached to countries in terms of their economic conditions relative to wealthier states. Although typically associated with political neutrality vis-à-vis the Western and Eastern blocs during the Cold War, the term “non-aligned” also can refer to countries that often are included among states possessing lesser amounts of economic wealth. The term “non-aligned,” of course, is associated with the “non-aligned movement,” that is, the “international anti-colonialist movement founded in Belgrade in 1961 to promote the interests of neutral (esp. Third World) countries not aligned with the superpowers of East or West” (*Oxford English Dictionary*).[14] As is true for many metaphors in international relations theory, “alignment” is a spatial metaphor inasmuch as the process of "aligning" is to "to range, place, or lay in a line" (*Oxford English Dictionary*). Metaphorically, in politics "alignment" is to "bring into line with a particular tradition, policy, group, or power" (ibid.). In a metaphorical sense then "non-aligned" countries occupy a physical space that is not associated with states that possess economic wealth or power. Non-alignment implies a sense of being set apart, either by choice or by circumstances, from countries that, by virtue of wealth and ideology, have gotten into line with each other or, to use yet another metaphor, have formed a "bloc."[15]

Another term that has been advanced to describe countries of less economic resources is "threshold" states or countries. In particular, the United States Agency for International Development (USAID) and the Millennium Challenge Corporation (a United States government corporation) have instituted the Threshold Program designed to provide economic assistance to poorer countries around the world. As the word implies, "threshold" countries are those that, metaphorically speaking, are on the verge of making reforms that would create greater levels of economic prosperity. Originating in Old English meaning "the sill of a doorway" (and hence metaphorical in its origins), a threshold in common parlance is "the beginning of a state or action, outset, opening" (*Oxford English Dictionary*). As applied to countries deemed worthy or economic assistance, the metaphor of "threshold" implies that, with some help and assistance, threshold countries that are on the verge of improvement could commence on such a path. In light of its association with aid-granting agencies the metaphorical connotations of "threshold" countries seem particularly appropriate. It is somewhat surprising in this context that the term has not caught on with scholars inasmuch that referring to countries on the "threshold" implies the possibility for economic improvement more so than static metaphors such as "periphery" or "dependent" states.

The futility of prevailing metaphors of global inequality is not lost on journalist Dayo Olopade (2014b) who, citing Bill Gates in the 2014 annual Bill and Melinda Gates Foundation letter, writes that terms involving "development" are no longer useful for describing global economic conditions.[16] Olopade (ibid.) goes on to observe just how misleading metaphorical terms describing world economics can be:

> Only when employing a crude "development" binary could anyone lump Mozambique and Mexico together. It's tough to pick a satisfying replacement. Talk of first, second and third worlds is passé, and it's hard to bear the Dickensian awkwardness of "industrialized nations." Forget, too, the more recent jargon about the "global south" and "global north." It makes little sense to counterpose poor countries with "the West" when many of the biggest economic success stories in the past few decades have come from the East. All of these antiquated terms imply that any given country is "developing" toward something, and that there is only one way to get there.

Olopade's alternative, which she elaborates on in her 2014 book, is to refer to economies as either "fat" or "lean." In countries with "fat" economies, that is, countries with large amounts of accumulated wealth, "plenty is normal. Abundance is the average…Problem solving is well beyond the basics of sanitation, vaccination, and electrification" (Olopade 2014a, 12). Yet "fat" economies are plagued with the problems of being "fat," such as an inclination for financial instability (as illustrated by the financial collapse of 2008), hyper consumption, and a dependence on imported sources of energy (ibid.).

By contrast, "lean" economies, those in places such as sub-Saharan Africa, grapple with problems of disease, unemployment, lack of adequate medical resources, and limited access to reliable sources of energy (ibid.). Yet, "these difficulties obscure more than a few silver linings. Individual Africans waste less food, owe less money, and maintain a regional carbon footprint that is the lowest in the world" (ibid., 13.). Thus, for Olopade, the terms "fat" and "lean" are far more descriptive in highlighting the qualitative differences in economic practices and conditions around the world than previous metaphors that seek to quantify a certain economic standard to which countries strive. Such a standard fails to acknowledge the different ways in which people live.

In fact, most of the metaphors discussed above have a sort of finality to them that does not capture the processes of change that are inherent in international political economy. One of the natural qualities of metaphors is that they provide terms of convenience. Yet convenience can have a price, in this case to fix a meaning in place so that it can be referred to without the necessity of repetition. Terms such as "Third World," "periphery," and "South" may identify a set of economic conditions at a particular time, but they are also terms of classification which, like other terms of classification—for example, those found in biology to classify the various kingdoms, phyla, genuses, species, etc.—group together a class of items, objects, or individuals which are then hard to conceive of outside of those groupings. This obviously can be problematic in the realm of global economics in which the economic conditions of regions, countries, and localities are constantly changing relative to their prior conditions and to the conditions of others. Metaphorical terms, in their linguistic convenience, are resistant to the changing conditions of that to which they refer.

On the other hand, Vicky Randall (2004, 43) warns us that "we should not be too preoccupied with semantics. Obviously the specific phrase 'Third World' is largely anachronistic in the wake of the collapse of what, in the original schema, was held to be the Second World, that is the Soviet Union and its satellites, although a case could possibly be made for continuing to distinguish for the moment between the (former) Second and First Worlds because of the enduring consequences of their very different histories."[17] On the other hand, these terms persist and, as metaphors, evoke the same sorts of responses and generate the same sorts of research agendas when they are anachronistic as when they possessed some geopolitical relevance. In fact, as Randall (ibid.) concedes, a "Third World-type category...draws attention to what continues to be a major axis of economic and political inequality" and "Third Worldist 'discourse' potentially provides a powerful rhetoric and rallying-point."[18] So the metaphorical qualities of terms such as "Third World" continue to provide both analytical and political functions. Ironically, one of the terms to describe changing economic conditions around the world in recent years is also one of the more literally descriptive, namely, the concept of "Newly Industrialized Countries." This term both describes the economic condition of the countries in question in a fairly straightforward fashion, but serves the purpose of a metaphor in its abbreviated state—NICs—by providing a succinct reference point that economizes on language by substituting literal language with an evocative term. To a certain extent, then, debates over the metaphors of the international distribution of economic resources and political influence can be circumvented with more literal terminology designed to be analytically useful in the study of "global inequality."

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Notes

1. In some ways, then, what is meant variously by "North–South relations," "First World" and "Third World," "Core" and "Periphery" and other metaphors may be an example of a concept that, as Searl (1979) notes, cannot be reproduced perfectly in literal terms and maintain the same meaning. However, it should be acknowledged that in a case such as this in which a variety of metaphorical expressions are available to express an abstract concept, whichever metaphor is chosen over the others reflects a decision to convey certain meanings and not others.

2. In physics one can speak metaphorically of numbered dimensions ("first dimension," "second dimension," etc.), while in the law certain crimes can be imagined with ordinal metaphors such as murder in the "first" or "second" degree.

3. Wolf-Phillips was challenged on her dating and origins of the term "Third World" but defends her findings in a later article in *Third World Quarterly*. See Wolf-Phillips (1987).

4. On the history of Third Worldism as a political force in international affairs, see Berger (2004).

5. The *American Heritage Dictionary* defines the noun "development" generically as "the act of developing" and "the state of being developed."

6. Leslie Wolf-Phillips (1979, 106) refers to Gunnar Myrdal's *Asian Drama* (1968) in which he suggests that opting for "developing" or "less-developed" over "under-developed" represents a linguistic gesture to countries in that category amounting to "diplomacy by terminology."

7. The "core" metaphor is not limited to studies of relations between economically disparate parts of the world. Samuel Huntington (1996) uses the term in conjunction with his analysis of the "clash of civilizations."

8. While the existence of a metaphorical "*semi*periphery" seemingly acknowledges the existence

of a realm between the core and the periphery, this semiperiphery is imagined more as an intermediate concentric circle than a zone of fluidity between the periphery and the core.

9. According to the *Oxford English Dictionary*, the first written use of the expression "north–south," pertaining to relations between more and less industrialized parts of the world, was in Franz Schurmann's *Ideology and Organization in Communist China* in which Schurmann (1966, 79) refers to the "growing north–south gap between industrialized and nonindustrialized countries."

10. Cardoso and Faletto (1979, xxiii) prefer the expression "situations of dependency" instead of the "theory" of dependency."

11. From the song "A Poor Man's Roses or a Rich Man's Gold," written by Bob Hilliard and Milton Delugg.

12. See, for example, Schön (1979).

13. See, for example, D'Anieri (2011).

14. While the *OED* includes a reference to the Non-Aligned Movement founded in Belgrade in 1961, it notes that the first written use of the term "non-aligned" was in 1957 in an article in the *Journal of Asian Studies*.

15. The term "bloc" is a variation of "block," which in politics has its etymological origins in "block vote," itself a metaphor for grouping together votes into a "block" (*Oxford English Dictionary*).

16. Bill Gates (2014, 6) writes in the Gate Foundation annual letter: "It is fair to say that the world has changed so much that the terms 'developing countries' and 'developed countries' have outlived their usefulness. Any category that lumps China and the Democratic Republic of Congo together confuses more than it clarifies. Some so-called developing countries have come so far that it's fair to say they have developed. A handful of failed states are hardly developing at all. Most countries

are somewhere in the middle. That's why it's more instructive to think about countries as low-, middle-, or high-income. (Some experts even divide middle-income into two sub-categories: lower-middle and upper-middle.)"

17. These trends, and the implications for the utility of the term "Third World," are also discussed in Randall (1992) and Berger (1994).

18. As the foregoing discussion shows, an ongoing debate in the journal *Third World Quarterly* revolves around whether or not the term "Third World" has any relevance in the study of international affairs.