Exploitation. A Socio-economic approach

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Abstract:

Exploitation is a paradoxical notion: both widely used to characterize imbalanced or extractive economic relations, and little discussed within social sciences. For socio-economics, exploitation offers three attractive properties, as compared to more commonly used concepts - inequality, domination, and discrimination - in that it is simultaneously *distributive*, *relational* and openly *counterfactual*. In order to answer what makes a labor contract, market transaction or social relation exploitative, we suggest an extended counterfactual approach, moving beyond strict Marxist and neo-classical baselines, that should strive to be *institutional* - paying attention to the variation of exploitative arrangements - *multi-scalar* - their imbrication - and *bottom-up* - through grounded normativities. This toolkit allows to move from the traditional focus either on the worker-employer dyad or rent capture, to a typology of four main exploitative forms - within the production unit, on the market, in the domestic sphere, and by the State - and the notion of chains of exploitation, since most real-world configurations involve layered relations, where many agents can stand both as exploiters and exploited.

Key words: Exploitation, Counterfactual, Theory, Inequality, Domination, Labor, Rent

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Introduction

On February 8th, 2021, 28 Moroccan textile workers, mostly women, perished in a clandestine factory located in an underground garage in Tangiers, while 18 more had to be rushed to the hospital. Torrential rainfall had flash-flooded the area, causing the unit to be rapidly overrun with water: workers were trapped with no possible exit, as most of them drowned before they could be rescued. The small workshop had not been declared nor authorized, despite its setup in an zone exposed to such risk. Rather, the local owner operated in connection with a larger industrial compound elsewhere in Tangiers, through firms primarily selling to multinational companies such as the Inditex Corporation whose portfolio includes the flagship low-cost brand Zara. Because these larger factories were under intense scrutiny from foreign auditors, a network of underground confection units, called *hofras* ("pits" in Arabic), set up by former male workers, had proliferated across the city. Those handled orders through outsourcing contracts, imposing lower wages, longer hours and weeks, and with little to no protection. Although tragic, this episode is far from isolated within the globalized garment industry, as this decoupling between distribution and production, famously described by Gerald Davis (2016) as "nikeification", often leads to complex commercial arrangements along global value chains and production networks, especially in the Global Souths.

This incident begged the immediate question of who was responsible for the heavy casualties, to pinpoint guilty parties among the intertwined set of economic actors, and devise the right sanctions, as well as compensations for victims. Yet from an analytical, and socio-economic perspective, the characterization of these interrelated vertical ties also raises distinct sets of issues. From a strictly marxist point of view, the main wrongdoer was the small local employer, who oversaw underpaid and unprotected workers. However, one cannot uncritically adhere to this reading, since foreign firms purposely design these cascading links in order to protect themselves from potential liabilities. Hence,

beyond the local middleman, can the set of intermediary firms and buyers, all the way up to the multinational headquarters, or final consumers, be deemed to take part in this system? In this state of the art, we argue that the concept of exploitation often proves useful to characterize such complex productive, commercial or subordinate chains – provided one lays out a correct set of criteria and properties for such an approach. Exploitation is indeed a paradoxical notion, both widely used to describe imbalanced or extractive relations, yet much less consistently discussed than other critical concepts within social sciences; namely, *inequality*, *domination* and *discrimination*.

This has, of course, much to do with Marx's own historical emphasis on the worker-employer dyad, which he argued was the primary form of exploitation under modern capitalism. Yet, we argue that the notion can be decoupled from this limited framework, while still retaining many of its attractive features. Many contemporary phenomena intuitively seem to beg for such a broader approach; from housing or credit inequalities to hiked prices, from globalized finance to various forms of subcontracting – through franchises or "gig" jobs – from "pocketbook" policing of disadvantaged neighborhoods to post-colonial legacies driving unequal exchanges between Global Norths and Souths. Does it make sense and to what degree can one say, for instance, that landlords exploit their tenants, energy suppliers their consumers, creditor their debtors, or husbands their spouse providing free domestic work? How do chains of exploitation operate, when multiple relational patterns are involved, such as workers and distant shareholders, or imperialist states and colonized subjects? These major questions all call for both empirically grounded and conceptually rigorous answers.

Rather than a survey of a well-established literature, this paper reviews works which often do not explicitly engage with the notion, but either rely on neighboring expressions, or whose methods and contributions situate under our purview. In doing so, we lay forth possible avenues for future research, providing scholars with practical guidelines, through two main sections. In Section 1, we highlight the analytical and empirical attributes of the notion, through a comparative analysis of three

main competing notions - *inequality*, *domination*, *discrimination* -, showing that exploitation stands a comparative advantage with all of these, in that it is simultaneously *relational*, *distributive* and explicitly *counterfactual*. We then lay out our own extended approach, centered on three main dimensions: exploitation analysis should simultaneously strive to be *institutional*, *multiscalar*, and *bottom-up*. In Section 2, we then turn to four main forms of exploitation: within the production unit, on the market, within the domestic sphere, and by the State. Finally, we insist on the notion of chains of exploitation, which characterize most real-life configurations.

1. Theories of Exploitation

In the following, we summarily review existing debates within exploitation theory, spanning from Marxian political economy and sociological theory to moral philosophy, exposing why exploitation can prove a fruitful concept (1) and how to potentially measure it (2). Then, we introduce the extended counterfactual approach along with an implementable toolkit.

1.1. Why Exploitation?

When contemporary social sciences apprehend asymmetrical social structures or relations, they tend to rely on two main concepts: inequality and domination. The first one is a distributional, quantitative notion: individuals or groups are compared, side-by-side, to measure who has more and who has less (income, wealth, opportunities, life expectancy, etc.), with exemplary studies focusing either on the top, such as the now famous 1% (Alvaredo *et al.* 2013) or on the bottom of the distribution (Banerjee and Duflo 2007; Ravallion 2015). But in itself, the concept of inequality is essentially descriptive: it doesn't specify the relationship between these two extremes, or who takes

from whom, directly or indirectly. Domination has quite opposite properties, in that it is purely qualitative and relational (Bourdieu 1976): an agent or a group is not dominant in absolute terms, but always in its *rapport* to a dominated agent or group, and domination analysis uncovers the mechanisms of that power relation — in general, it thus resists quantification. This conceptual gap is somewhat frustrating since many socio-economic phenomena exhibit both distributional and relational components; imbalances to be measured and economic relations which are reproduced, or sometimes contested.

The notion of exploitation seems well equipped to bridge such a gap in that, according to most acceptations, it designates the appropriation of value by a dominant agent or group, through an unequal relationship: it is hence both qualitative (or relational) and possibly quantitative (or distributional). The scientific use of the concept has surely suffered from the distrust of Marxist traditions gaining ground since the 1980s, coinciding with mounting technical difficulties, within Marxist economics, to precisely define what it was. Yet conceptual elaborations persevered not only within marxist sociology (Burawoy 1982; Wright 2000; Sakamoto and Liu 2006; Avent-Holt 2015), but among scholars of power, inequality, or poverty, adopting a relational perspective (Tilly 1998; Tomaskovic-Devey and Avent-Holt 2019; Folbre 2020; Desmond 2023). More generally, exploitation remains widely used by social scientists, within a variety of contexts, to characterize imbalanced or extractive economic relations, yet it remains little discussed as such.

This is in sharp contrast to moral philosophy, where a rich body of conceptual work has expanded during the last decades (Wertheimer 1999; Sample 2003; Deveaux and Panitch 2017; Ferguson and Zwolinski 2024). However, the rift between those and social sciences remains hard to mend: the questions asked are often of an individual, moral character, and the reasonings tend to rely on thought experiments rather than empirical data[1]. Some contributions do open possible discussions,

[1] Far from dismissing this rich literature, we rely on it when relevant for empirical analysis, especially in Section 2.

especially when they strive to articulate social structures with interpersonal exploitative relations: Wollner (2019) thus insists for instance on "anonymous" exploitation, which can be simultaneously "non-individual, non-agential, and structural" - meaning that exploitation can happen between groups, be devoid of clear intentions, and benefit both exploiters and exploited - or Vrousalis (2022) who connects a theory of domination with the unequal distribution of property.

1.2. How to Measure It?

The Marxist Tradition: Exploitation as Surplus Labor

In the traditional Marxist conception, exploitation is tied to surplus labor, *i.e.* the fraction of a worker's labor time appropriated by someone else — typically a non-working member of the ruling class. For Marx, the paradigmatic illustration of this was feudal serfdom: the serf toils for his master, on the master's land, for a fraction of the year, but also for himself, on his own land, the rest of the time (Marx 1992 [1867]:344-353). Marx then generalizes this concept to other modes of production, and especially capitalism, where the separation between "necessary" (for oneself) and "surplus" labor is not directly measurable. However, as Marx famously argued, the ratio between the two can still be computed by comparing profits and wages; thus defining the "degree of exploitation" (ibid.: 320-329). Yet in doing so he relies on the strong assumption that the quantity of labor an agent can acquire through the market is proportional to her monetary wealth, which is true if and only if the price of all products is proportional to the labor time embodied in them. This much disputed labor theory of value thus defines a simple, proportional conversion of labor times into money which, though appealing, has been challenged on various theoretical grounds.

This has sparked a long, technical, and sometimes polemical debate (Desai 1988) among both Marxist and neo-classical economists: on the one hand, the claim that equilibrium prices ("production prices") are proportional to embodied labor time does not hold, as was already mentioned by Ricardo (Stigler 1958), and more generally, the idea that prices derive from a "transformation" of labor values is either false or tautological (Samuelson 1971, Steedman 1977). Yet on the other hand, as Sen (1979) and Cohen (1988: 214) have argued, one can reject the *causal* labor theory of value and still adopt a *descriptive* approach to surplus labor. Indeed, Marxist economists have long shown that in a Leontief model where the production technology can be described by an input-output matrix with fixed coefficients, it is possible to compute the labor embodied in any product by inverting said matrix (Okishio 1963; Morishima 1973). Here, if an agent provides more labor time than she can appropriates through her purchasing power, then she is exploited, otherwise she is an exploiter. During the 1970s and 1980s, much effort was done to extend such definitions to more complex models, to take into account fixed capital or the choice of techniques (Morishima, 1973; Roemer 1982). However, these obstacles to measurement related to technological complexity should not be overstated, as it is always possible to fit a Leontief model on national accounts to obtain a reasonable approximation.

A more important challenge resides in the so-called reduction of complex to simple labor, i.e. the conversion of various types of labor into a homogeneous metric. A variety of solutions have been proposed in this regard, such as positing all labor hours as equivalent (Bowles and Gintis 1977), factoring in the hours of education received by the worker (Morishima 1973, Roncaglia 1974), or, as the New Interpretation had suggested (Foley 1982; Veneziani and Yoshihara 2017), assuming that the labor contributed is proportional to the wage received. Depending on the convention adopted, the analysis thus maps distinct patterns of exploitative relationships. If one follows the homogeneous approach, many well-paid employees will be characterized as exploiters, to the extent that their wage is disconnected from their working time; yet according to the New Interpretation, no employee can

by definition be an exploiter. Each option thus defines an abstract baseline, corresponding to an economy without exploitation; from equal pay for all workers, to the abolition of profits but still preserving the actual wage scale, or any intermediate pattern. In sum, the descriptive approach to surplus labor relies on irremediably normative assumptions, although often implicit in the analysis.

The Neoclassical Approach: Exploitation as Rent

A competing approach has had a long standing within neo-classical economics (Pigou 1932), measuring exploitation as the gap between wages and marginal productivity. Here, the degree of exploitation is not captured by the profit share, but the distance to a perfectly competitive benchmark: exploitation is measured as rent, and exploiters are conceived as rentiers. Robinson (1933) developed the adequate, corresponding theoretical framework for the labor market, through monopsony theory, with exploitation strictly arising when obstacles to workers' mobility limit the competition between employers. This meaning is now standard within neoclassical studies of labor exploitation (Ashenfelter *et al.* 2010), and to some extent within quantitative sociology (Sakamoto and Kim, 2010).

Similar views have been strongly revived in philosophy and sociological theory, from the 1990s onward (Wertheimer 1999, Sørensen 2000), when traditional Marxist takes had started sliding in the background. Here, a core argument is that "the competitive market price is a price at which neither party takes *special* unfair advantage of particular defects in the other party's decision-making capacity" (Wertheimer 1999:232). The intuition at work is the neoclassical idea of competitive discipline: under perfect competition, a given agent has no arbitrary power and hence could not be an exploiter. In sociological theory, a similar view of exploitation as rent has been put forward by Sørensen (2000)[2], who suggested holding on to the Marxian view of exploitation as economic antagonism, but to

[2] For a critique, see Wright (2000).

decouple it from any labor theory of value by restricting it to "rent-producing assets", such as land or intellectual property.

While we do not deny that rentier relations can be exploitative, this imposes a strong restriction for exploitation theory. Indeed, what these proposals have in common is their insistence on a unique non-exploitative counterfactual, defined as an unequal (although rent-less) market society where profits derive from the distribution of the means of production. Yet this is often limitative: Wertheimer's claim that there is no room for domination within competitive markets has been disputed (Lojkine 2022; Vrousalis 2023), whereas Sørensen's claim that this is the only framework consistent with "modern economic theory" simply seems unwarranted. The same argument applies to the difference between exploitation and another concept: discrimination. Exploitation and discrimination might appear very close, since for instance both would designate a relation where the employer does not pay the worker the full value of her labor. Yet one major difference lies in the implicit counterfactual: a worker is discriminated against if she gets less than a 'typical', average or median worker, as measured empirically (Lang and Spitzer 2020). Discrimination thus vanishes if all the workers are treated equally, under existing institutions, whereas exploitation points to structural alternatives, where all workers would be treated differently.

1.3. Towards a Counterfactual Approach in Socio-Economics

To overcome the limits of both Marxist and neo-classical views, we follow Roemer (1982) in explicitly adopting a *counterfactual approach*: the exploiters are defined as the ones who benefit from the *status quo* as compared to a non-exploitative baseline, whereas the exploited are those who would be better-off by transitioning to that alternative situation. Such an approach allows to encompass and compare the specific definitions mentioned so far, based on the explicit baselines: while the liberal

concept defines a fully commodified, perfectly competitive market society with no restriction on wealth inequality as its normative horizon, the Marxist alternative famously begs for the abolition of the private property of the means of production.

To some degree, the counterfactual approach is also implicitly at work in some sociological writings adopting a relational view to exploitation, such as those of Tilly (1998) or its more recent revival by Desmond (2023). Indeed, one of Tilly's criteria for exploitation is a "skewed division of returns as compared with effort" where outsiders are "excluded from the full value added by that effort" (Tilly, 1998: 128-9). Yet this raises the question of how to define a non-skewed division of returns, or put differently to outline the precise counterfactual. Similarly, while Desmond (2023) emphasizes that some social groups directly benefit from poverty traps (thus exploiting the poor), his definition oscillates between direct, local interactions and larger, structural effects at the country level (while entirely dismissing globalized chains), issues which point to distinct, potentially conflicting counterfactuals[3]. Expanding on these, we argue that an extended counterfactual approach can turn exploitation into an applicable concept for empirical social sciences, provided that the analysis be *institutional, multiscalar* and *bottom-up*.

Institutional means opening the space of alternatives to capitalist exploitation beyond the two aforementioned options: important historical examples where exploitation has arguably been abolished or attenuated, far from being reducible to theoretical schemes, took a variety of original institutional forms - such as social security, public housing, public services, labor law, etc - that can be analyzed empirically. Combined, these have at times substituted for exploitative relations, or in others weakened them through regulation or by reducing the exploited dependency on their exploiter. The *multiscalar* property should help us answer the question "who exploits whom?", even in the presence

[3] Roemer (1982), for his part, considered a quite idiosyncratic counterfactual, that of a perfectly competitive market society with equal ownership of the means of production, i.e. a form of "market socialism".

of imbricated chains, where agents can be both exploited and exploiters, depending of the relational segment considered[4]. One easily implementable possibility is to proceed by increments: first looking at a limited sphere of the social world (i.e. the plant, the firm, the industry) and then moving on to national or global scales. This allows keeping track of exploitative forms, to distinguish between direct and indirect exploiters, and subsequently, on a more normative level, to consider anchored alternatives at each scale.

Finally, the non-exploitative counterfactual should be, as much as possible, anchored in the implicit or explicit normative *aspirations of the exploited* themselves (Renault 2019 [2004], Avent-Holt 2015). An important benefit of doing so, especially for social scientists, is to avoid placing the theorist in the position of decreeing what ought to be. Moreover, this does not mean that the collection of raw testimonies from exploited individuals or groups would, in itself, make for a reliable counterfactual. Rather, since exploitative forms often intertwine multiple scales and shifting group politics, where future alternatives can come in conflict, this emphasizes the role of political institutions in mediating and arbitrating these non-exploitative horizons.

2. Forms of Exploitation

In the following, we build a typology of four, main exploitative forms, using existing empirical research to identify possible measures of exploitation, along with corresponding counterfactuals. This classification moves from the production unit (1) to market exchanges (2), the domestic sphere (3) and through the State (4). Finally, since most real-life configurations incorporate several, imbricated forms, we insist on chains of exploitation as a future research agenda (5).

[4] Notably, Roemer (1982) did not offer a solution to this problem, only claiming that one class exploits the other as a whole.

2.1. Regimes of Workers' Exploitation

In *Capital*, Marx offered not only a quantitative measure of exploitation as surplus labor, but a qualitative theory of the "relation of production" that in his eyes was the primary vehicle for capitalist exploitation: the wage relation: on the so-called labor market, the wage worker does not sell her labor but her labor power, the price of which tends to align with the cost of reproducing said power. In turn, profit emerges once a capitalist (here the typical exploiter) manages to extract more hours of work beyond this cost. Hence, in Marx' view, exploitation strictly takes place within the productive sphere, with a corollary domination over labor inside the production unit, where the worker loses her freedom to subordinate to the needs of capital. The sociology of work has long studied the capitalist production unit where profit-driven domination tends to intensify work (from Friedmann [1961] and Braverman [1974] onwards), with recent research showing how technological control of the labor process has been complemented, since the 1980s, by other forms of pressure relying on an ideology of consent, freedom, and corporate culture (Burawoy 1982; Kunda 1992; Boltanski and Chiapello 1999).

Yet, the capitalist use of modern technology to control and intensify work has by no means ceased to exist, even in modern industries, be it call centers where workers have to follow pre-established scripts (Buscatto 2002, Woodcock 2016), in the fast-growing logistics sector where they operate under voice command (Gaborieau 2017), or through digital surveillance devices (Antonio and Gramano 2019; Levy 2023). Evidently, social scientists have also shown how labor struggles have generated institutions meant to attenuate this domination within the workplace, notably labor law and unions, through direct norms (minimum wage, maximum working hours, safety norms, etc.) as well as bargaining prerogatives. Despite these varying in form and strength, in some cases such as the Scandinavian system of industrial relations, they did contribute to reduced exploitation for groups of

workers (Swenson 1989; Batut *et al.* 2023). During the last decades, neoliberal policies have tended to erode them globally though differentially, through the development of precarious labor market segments (Hipp *et al.*, 2015), with extreme forms observable in the "gig-economy" (Rahman and Thelen, 2019).

Institutional variety also affects the "free" character of the labor contract. Indeed, in Marx' writings, labor under capitalism is "free" in the sense of a "mute compulsion" (Mau 2023): workers are not coerced, but they depend on wages to get by. Direct, personal domination is thus confined to the production unit, whereas impersonal economic power rules the labor market. Yet historically, workers' contractual freedom under modern capitalism has often been limited, such as under mixed regimes known as "indentured" or "contract" labor, where workers typically enroll for several years for an employer in a distant region, a period during which they abandon *de jure* or *de facto* the possibility to quit, change jobs, contest non-payments or mistreatments. Examples of "diverse, coexisting, entangled, and overlapping" labor regimes pervade the history of colonial labor (De Vito *et al.* 2020), even after the abolition of slavery (Breman 2015, Varma 2017, Bittmann 2023), showing that the divide between free (wage) and unfree (slave) labor is often a teleological construction. And despite their decline, these regimes still persist within contemporary economies, with well-documented cases including the *kafala* system within the Arabic Peninsula (Gardner 2010; Nyarko and Yang 2016), no-poaching clauses in U.S. labor contracts (Capobianco 2019), or the lower status of foreign workers, through H-2A visas in the U.S. or posted workers in the E.U. (Weiler *et al.* 2021; Muñoz 2023). This evidence suggests that the production unit is still a major locus for exploitation, yet with varying institutional arrangements that classical Marxism long failed to apprehend.

2.2. Market Exploitation

It is well established that poor and lower-class consumers pay more for a variety of goods and services, including housing and credit, yet to what degree are they exploited by landlords, lenders, or price-fixing firms and brokers? Market exploitation can indeed occur without direct face-to-face interactions, either through "price gouging", high mark-ups or unfair extortion (Deveaux and Panitch 2017), yet as we saw earlier assimilating exploitation to pure economic "rent" is often not satisfactory. In the following, we thus lay out two simple principles to study market exploitation through a counterfactual lens: first, exploitation in the sphere of circulation and production are often intertwined[5]. Second, these are not distinct in nature, but differ in the way power imbalances are temporally distributed: contrary to the wage relation, where exploitation is constitutive of the very *rapport*, within market transactions domination and violence are experienced by the exploited during peak moments, such as contracting, payment, and debt collection.

Exploitation or Predation?

In his pioneer work *The Poor Pay More* (1967), sociologist David Caplovitz explicitly referred to "exploited consumers", a specific type of marketplace exploitation afflicting the "poor". More than a theoretical gesture, Caplovitz's study was concerned by consumer protection, for segments typically excluded from typical labor or civil constituencies. More recent studies, primarily in the U.S., have built on similar intuitions, congregating around the notions of "predatory lending" and "predatory inclusion". The latter describes a staggered process of financialization - especially on housing and

[5] While defining and circumscribing market exchange has been the subject of much debate within economic sociology, here we adopt a broad definition, encompassing both neoclassical and anthropological understandings of horizontal transactions, whether formal or not, through face-to-face or indirect interactions.

credit markets -, with a first step leading to exclusion of many lower-class and non-white constituencies, only to be included during a second phase, yet "on different and more expensive terms" (Taylor 2019). Originally coined to explain why residential segregation outlived the end of redlining, the expression is now used in a wide variety of socially or racially segmented markets such as credit cards, mortgages, student debt, or rental housing (Seamster and Charron-Chénier 2017; Faber 2020; Besbris *et al.* 2022).

Though the vocabulary of "predation" introduces relational and extractive components, it tends to draw a moral, and often artificial line, between mainstream and "fringe" market sellers; or simply put between "good" and "bad" capitalists. Theoretically, it implicitly hinges on a liberal counterfactual, since the structural conditions under which capitalism operates are only inacceptable insofar as they open the possibility of "predation". Mainstream financial and corporate actors, that is the traditional circuits of capital, are less frequently described as "predators", a qualifier reserved for second-tier brokers such as "subprime" or payday lenders (Bittmann 2024). Yet this consequentialist view of market morality obscures the fact that exploitation can often benefit both parties involved, especially when low-class consumers have no other options (Deveaux and Panitch 2017). In short, the counterfactual to "predation" involves two unsatisfactory outcomes: either the eradication of "immoral" practices, a gateway to exclusion, or calls for broad structural changes - such as higher wages, welfare support or anti-discriminatory efforts - but with no real connection to the issue at hand. Quite on the contrary, the concept of exploitation doesn't anchor the divide between exploited and non-exploited to the presumed morality of actors, but rather seeks to characterize to what *degrees* can consumers be exploited, with respect to which baseline.

Housing, Credit, and Prices

To provide an example, Desmond and Wilmers (2019) have recently put to the test the notion of "renter exploitation" on the U.S. housing market, defined as the "ratio of annual rents from all rental units" collected by landlords "over property value", adjusted for several "maintenance costs". The authors then show this ratio is steeper in areas with higher poverty rates and a larger share of black residents. Crucially, here "overpayment is not defined in terms of economic rent, and does not presuppose barriers to entry that limit competition among landlords (e.g. collusion, monopoly)". Rather, the authors define on a "counterfactual of property ownership", that is the "costs of purchasing a housing unit" for renters; a majority of which are credit constrained on the mortgage market. This study offers a counterpoint to Desmond's more ethnographic shadowing of two Milwaukee owners, since here landlords extract profits as a "group", producing different levels of "statistical exploitation" among distinct groups of tenants (Wollner 2019). In turn, this pushes the authors to support programs targeted at expanding homeownership, mitigating risk for low-income and racialized households, as well as bringing down housing costs. As always, the counterfactual analysis is limited in scope: the authors do not factor in the speculative trends within rental markets, and neither do they address the underlying inequalities driving housing crises, especially along class lines. Still, specifying an tractable index along with a clear counterfactual allows for a grounded discussion of "housing exploitation", which goes beyond "interindividual distributions" of prices.

Beyond such a consistent, quantitative instrument, recent studies devoted to consumer debt have shown how exploitation can operate through multiple relations and at various scales, between the lender and the borrower, but also in connection with legal intermediaries and employers. Consumer credit is a standout case since it was precisely relegated by Marx as a "secondary exploitation, which proceeds alongside the original exploitation that takes place directly within the

production process itself" (Marx (1981 [1894]): 745). Yet as Albert (2021) and Bittmann (2024) have shown, in the early twentieth century France and U.S., credit contracts were increasingly tied either to a fixed or secure pay, or the possession of small collateral in connection to one's job; all of which could be garnished in cases of default. Seeking credit in turn produced strong disciplining effects, with workers-consumers having to adapt their behavior and budgets to convince lenders or brokers of their good standing. The connection between labor and credit was even more striking when debt was collected: in Paris as in Atlanta, agents visited their "clients" every week, preferably on payday, to collect payments on their accounts. Defaulting borrowers often faced, and still do (Desmond 2023), dire consequences, with creditors having often a preferential access to judiciary institutions, facilitating garnishments.

Beyond housing and consumer finance, other forms of market exploitation remain critically underexplored. Those include spheres such as private insurances, medical services, or energy supplies. Similarly, platform companies now enjoy considerable monopoly power (Khan 2016, Rahman and Thelen 2019; Attwood-Charles *et al.* 2021), to the point that their asymmetric relation to users has been described as "techno-feudal" (Durand 2021). Finally, the question of exploitative pricing also needs be investigated at the aggregate level, as the bargaining on nominal wages, (the traditional focus of the Marxist exploitation) is only one side of the macroeconomic division of value-added. With the global inflationary episode beginning in 2021, the issue of "seller's inflation" (Weber and Wasner 2023) has been increasingly raised, with firms hiking prices beyond supply-side constraints (Glover *et al.* 2023). This has remained a major blank spot within economic sociology, despite price levels raising complex distributional conflicts, not only between workers and employers, or countries, but with respect to the extractive power of price-setting firms, especially in the food or energy sectors (Serafin 2022).

2.3. Family Affairs: Domestic Work, Wealth Accumulation and Reproductive Labor

Exploitation within the domestic and familial spheres has been explored by feminist scholars and activists since the 1980s. Those took issue with many Marxists' underestimation of women's exploitation, often treated as secondary to that of the "proletariat", especially for forms of labor located outside the capitalist production unit, such as domestic chores or sexual labor (Federici 2012, Vogel 2014). In their landmark book, Delphy and Leonard (1992: 42) strived to restore this balance, placing capitalism and patriarchy on equal footing, with domestic exploitation being defined as a relation where "things produced by the labor of one person are consumed by another in an unbalanced exchange". Here again, the Marxist concept of surplus labor served to uphold such an analytical expansion: women, spouses, or children, are exploited inasmuch as their worktime is "appropriated" by men without pay, thus echoing and amplifying what is happening within commodified production[6]. However, as we argue below, the counterfactual approach allows to consider the exploitation of various forms of labor under patriarchy, beyond the strict analogy with the production unit.

The Microeconomics of Family Exploitation

Despite some early empirical studies (Barthez 1984, Delphy and Leonard 1992) approaches rooted in materialist feminism have been long overshadowed by "household microeconomics", a subfield stemming from the neo-classical side of the theoretical spectrum. Following Becker (1981), this well-established literature offers a purely individual-transactional take on exploitation, treating the

[6] Some authors like Guillaumin (2016) went one step further, pointing to the "appropriation" of women's physical bodies through the notion of "sex classes", thus abstracting exploitation from the strict realm of material affairs.

spousal unit as a productive dyad maximizing a utility function under time, budget, and technological constraints - with outputs including food, children-rearing, leisure or housing. Women's domestic work is interpreted as a part of an optimal division of labor, with gendered differences in both productivity and preference treated as a given. The literature has progressively moved beyond Becker's "unitary" framework to introduce intra-couple bargaining, with more or less complex rules (Chiappori *et al.* 2022), and relied extensively on time-use data, to explain several stylized facts regarding time-allocation patterns. The distribution of domestic work in bi-active heterosexual couples is still highly unequal in most countries, with a limited decrease linked to higher market productivity for women (through longer studies) and a broader access to outsourced services. Typically, marriage is associated to a "premium" for men and a "penalty" for women, both in term of labor supply and income (Petersen *et al.* 2014), with specialization choices being better explained by relative rather than absolute wages, and men's inelastic labor supply being consistently observed across a range of measures and countries. In sum, despite these studies not relying on the concept of exploitation, this suggests that heterosexual women are, as a group, exploited by their partners at the family level.

Yet this literature bears major, and well-known shortcomings: they account poorly for intertemporal dynamics, that is how behaviors are affected through marriage or divorce, and cannot convincingly explain the sexual division of labor between spouses, at the heart of domestic exploitation (Chiappori *et al.* 2022). The main economic narrative has consistently relied on comparative advantages to explain specialization choices, yet as Siminski and Yetsenga (2022) have recently shown through Australian data, according to this model women should be 109 times more productive in paid labor in order to achieve equality in domestic chores - which is highly unlikely. Rather, economists now routinely rely on notions of "norms" and "identity" to fill in the empirical gaps, mostly through a psychological understanding of utility penalties in case of deviance (Bertrand *et al.* 2015). Yet this still fails to push beyond the individual-transactional level, with similar methodological limits: since

"intrahousehold allocation" is never directly observable, these approaches build conditions and testable restrictions derived either from labor market choices or naturalized psychological attributes, making it "unclear whether or not the final conclusions obtained by household collective models of labor supply are accurate" (Chiappori *et al.* 2022). This begs both for a more fine-grained analysis of intra-couple dynamics, as well as a better grasp of the structural nature of women's exploitation under patriarchy (Bessière and Gollac 2023).

Exploiting Domestic, Sexual, Clinal and Emotional Labor

In its current state, microeconomics is thus poorly armed to study exploitation in or linked to the domestic sphere. First of all, while time-use surveys document the increasing externalization of domestic tasks, the consequences of these evolutions for women as a social group are less frequently looked into. As such, through outsourcing, within-couple exploitation is often reported unto lower, racialized segments of the female working class, many of whom are excluded from minimal wages, collective agreements, or remunerated through non-monetary transfers of gifts and favors. This "golden exploitation" serves to mask actual work conditions, with long-time workers frequently presented as "family members" (yet consistently excluded from money transfers or patrimonial arrangements) precisely to frame work exploitation as willful devotion (Jansen 2015, Delpierre 2022).

Second, the broader, life-cycle effects of domestic exploitation on wealth accumulation are much less consistently explored (Schneebaum *et al.*, 2018). Gaps in assets, tied to aforementioned specializations or pre-existing capital disparities between partners, trickle into further life stages, through "divorce penalties", access to lower retirement pensions and inheritance proceedings often detrimental to women (Bó 2022). This is true both in contexts where formal equality is not achieved, such as many former colonial societies (N'Diaye 2014), and countries where it is. And even in the

latter, wealth gaps are amplified by legal intermediaries, such as notaries and judges, whenever divorce or heritage settlements are negotiated (Bessière and Gollac 2023). The same goes for relational accounting between spouses: how is money pooled, allocated across expenses and bills depending on each partner's contribution? How is capital accumulation negotiated through gendered norms and interactions? Data on both capital assets and spending is often pooled at the household level in national surveys, except in rare cases such as France and Germany; thus stalling our understanding of individualized wealth accumulation (Grabka *et al.*, 2015; Frémeaux and Leturcq 2020). Further research on family exploitation would thus be needed to better apprehend the complex set of imbalanced monetary transfers between couples or kins, as compared to respective income, time and capital contributions, all the way from marriages through break-ups and deaths.

Third, the literature on sexual and clinical exploitation, especially through commercial surrogacy, provides a rare example of fecund interaction between socio-economics and philosophy. The rise of of globalized market for gestational labor raised explicit moral and ethical considerations in the 1990s, among scholars of exploitation (Anderson 1990, Wertheimer 1999), many of whom asking whether it was possible or desirable to "commodify" this type of labor, and whether these practices were exploitative for surrogate mothers, irrespective of pay levels. While these interrogations remained initially abstract, several field studies were conducted during the 2000s and 2010s, with a focus on countries of the Global Souths, and primarily India (Pande 2014, Rudrappa 2015). These ethnographies helped shed light on the lived experiences of mothers, showing that the "reproductive assembly line" articulated complex issues of class, race and gender (Rudrappa 2015). Crucially, many women choosing to commodify their wombs did so seeking to evade an exploitative garment industry, which holds a quasi-monopsony in many urban areas. Building a counterfactual analysis of gestational exploitation must therefore take into account not only Western families choosing to outsource reproductive labor to low-wage countries, but outside options and exploiters tied to global production

networks, as well as the steep fees charged by doctors and private clinics. Far from subordinating empirical work to analytical thinking, such collaborative efforts helped spur more anchored developments about possible regulations or a "fair" remuneration (Phillips 2017).

Fourth, the types of "feelings rules" and "emotional work" involved in extreme cases such as commercial surrogacy actually span throughout other labor forms, from paid to domestic work, to family care or the symbolic appropriation of wealth (Kang 2010; Bandelj *et al.*, 2016). With or without clear price equivalences, women's emotional or care work can be exploited in distinct ways which are not sufficiently explored. As an example, to the extent that "mental load" - which includes planning, scheduling and caring for others (Dean *et al.*, 2022) - is often an effort performed by women to the benefit of household's members, it should qualify as exploited labor. Yet since it precisely escapes any simple quantitative index, where this unpaid work would be expressed in hours of labor, echoing measurement challenges mentioned above. Rather, the counterfactual approach allows to overcome such an impossibility to provide a homogeneous measure, helping to think about the normative possibilities for a fairer division of physical, emotional and cognitive tasks within the household.

2.4. The State as an Exploiter

Classical, Marxist accounts often present the state as a mere conduit for exploitation, "a coercive institution which maintains the rule of the game" (Roemer 1982: 42), and contributes to the extraction of surplus value (Poulantzas 2020). In this view, political power is thus reduced to the reproduction of the capitalist order, through the enforcement of property rights for the main production factors (land, labor and money), channeling public investment towards private enterprise, or expanding productive forces through military conquests. In the case of England, famously studied by Marx and Ricardo, the monarchic state thus intervened consistently and violently in favor of

landowners and industrialists, leading to two intertwined processes: proletarianization and the primitive accumulation of capital. These concepts still prove useful for a range of scholars, both to describe feudal societies (Alfani and Di Tullio 2019: 142-144), and understand contemporary forms of land or resource-based spoliation facilitated by the state (Harvey 2005). Recently, this has been thematized around racial capitalism in both South and North America, where settler colonialism and chattel slavery produced a "racial/colonial primitive accumulation", centered around land grabs and the exploitation of slave labor (Issar 2021). While we do not undermine the contemporary ramifications of these dynamics, we consider proletarianization and primitive accumulation as pre-conditions (in an analytical, and not historical sense) for exploitation, rather than exploitation itself. In the following, we rather suggest two more direct forms of exploitation by the State, either through fiscal or penal powers.

Fiscal Exploitation

Through the fiscal system, consisting of both direct taxes (on revenues or wealth) and indirect tariffs (on consumption), the state plays a major distributive role, socializing expenses through collective levies; thus raising issues of allocative fairness. Since taxation does not involve direct relations between exploiters and exploited, speaking of exploitation requires formulating an explicit counterfactual as to what some might consider an unjustified burden on their revenues. In this regard, the history of tax revolts and resistance proves insightful to understand how constituents claimed that their communities were exploited through fiscal policymaking. Time and again, these have been at the root of major revolutions and political upheavals, either to oppose costly conflicts waged abroad by feudal, "domain states", demand more retribution through welfare from later "tax states", or simply lower the levies captured by the Leviathan (Schumpeter 1918). Because tax systems define a social

contract where "relations of extraction" and "relations of redistribution" need to be equated to some degree (Daunton 1996), *fiscal exploitation* can arise whenever those are perceived as imbalanced.

Adepts of liberal or libertarian creeds have actively voiced such rejections: as early as the eighteenth century, Say (1971[1821]: 130) thus referred to taxes as "mere spoliation": even if "levied by national content", taxes remained in his eyes an extractive device used by the "unproductive classes" to prey upon the "industry of individuals". Closer to the present day, partisans of a "nightwatchman" state have repeatedly endorsed tax resistance on behalf of similar precepts (Martin 2008). Among the California tax revolts during the 1970s, public choice theorist James Buchanan (1976) thus explicitly spoke of "fiscal exploitation" to support property tax reductions (through Proposition 13), levies he believed were detrimental to consumers and economic efficiency. However, fiscal sociology has also strived to emphasize the complex roots of tax resistance, often resting in the defense of a specific segment or territory. The California tax revolts were no exception, with for instance many African American taxpayers arguing that "their [our] tax money" was being used to finance industrial and urban projects in suburban white areas, thus diverting capital away from local investments (Self 2005: 131, 195). As Martin (2008) has argued on a broader scale, despite these movements being later recuperated by right-wing conservatives, many constituents originally mobilized to defend an "invisible welfare state", in the form of local and "informal fiscal privileges" which the federal administration was precisely trying to curb.

The case of imperial and colonial taxation provides an even more striking case of decoupling between "extraction" and "redistribution" (Daunton 1996); that is taxation and welfare. Historians of fiscal systems have just started to understand how displacing the "tax burden from metropole to the periphery" contributed to the univocal extraction of resources from distant subjects, thus shaping enduring inequalities at the global level (Bhambra and McClure 2022:1). While the case of Haiti's "odious debt" is now well documented, these imbalanced arrangements were commonplace

throughout empires, often leading to a "racialized [...] fiscal hierarchy" (Woker 2022). Furthermore, fiscal and wage exploitation were closely tied in this context: in the French Empire, the poll tax (*capitation*) was primarily made to "force colonial subjects into wage labor" with, conversely, fiscal seizure being facilitated by formalized labor (Woker 2022: 47). For colonial taxes, exploiter status not only applies to the Leviathan state, but metropolitan taxpayers as well, since those benefited from cheaper colonial products as well as geopolitical clout, despite a low fiscal burden. Symmetrically, for (exploited) imperial taxpayers, formulating a political alternative often combined demands for distributive equality, with more radical claims at political autonomy.

Penal Exploitation

Beyond taxation, the state's police power can also lead to direct forms of exploitation of its citizens or subjects, through both labor and monetary punishments with strong distributive effects. Labor historians' insistence on "penal work" as a "historically ubiquitous institution" shows that the State penal power was persistently used to corral and utilize underpaid labor, specifically for racialized or low-status segments of the workforce (De Vito and Lichtenstein 2016). Among a plethora of similar arrangements, in the Dutch East Indies (modern Indonesia) between 1870 and 1930, convict labor was massively put to productive use after the abolition of slavery: on top of a "disciplinary function", these punishments had a "productive function", with the growth of carceral labor being tied to major expansionary projects. In 1900, there were over 275,000 sentences *per annum*, tailored to the needs of private actors, with the "colonial-carceral system [...] effectively weaving together control, coercion, and exploitation" (van Rossum 2018).

Similarly, in the post-Civil War U.S. South, Muller (2018: 396) showed that the "leasing" of convicts to private companies developed more "in cities and in counties where African-Americans

had achieved a degree of economic independence", and where "white civilians, sheriffs, and police had little to lose in [...] punish[ing] property crimes". Convict leasing thus underlines the deep connection between "exclusion and exploitation" (Muller 2021): because the end of slavery "consigned [Black American] to the bottom of the labor market", the "relations of exploitations" signified "dependence" of employers on this form of labor. As this demand fell drastically after the Second World War, "first with the mechanization of cotton harvesting, then with deindustrialization", the participation of Black men in the labor force collapsed, with crime rates escalating rapidly "amid a Conservative reaction to the both the second Great Migration and the Civil Rights Movement". Emphasizing these macro trends underlines how exploitation helps better connect distributive measures of inequalities with broader issues of (here racial) domination.

Beyond the carceral state, the question of court-ordered monetary sanctions has recently attracted a lot of scholarly attention in the United States, along with their drastic rise over the last forty years (Harris 2016; Kohler-Hausmann 2018). Millions of convicted citizens are routinely exposed to legal financial obligations (LFOS), leading to increased legal debt with major long term effects on poverty and inequalities (Harris *et al.* 2010; Kohler-Hausmann 2022). This is specifically true for subfelonies, many of which having been partly decriminalized into civil offenses, starting from the period known as the Broken Window Era in the late 1980s. In Ferguson, Missouri, a study thus found that $2.2 million had been collected in municipal fines in 2012, through 24,500 warrants, amounting to $272 per household (Harris 2016). This form of "pocketbook policing" is now commonly used in municipalities where fiscal revenues (mostly through sales taxes paid by non-residents), prove more difficult to collect, pushing officials to turn to "'bad' revenues like legal fines to manage fiscal crises" (Pacewicz and Robinson III 2021). At the political economy level, this functions as an implicit taxation on the poor, since groups overly exposed to LFOs subsidize non-discriminated citizens, through increased revenues without subsequent tax raises. And at a more fine-grained level, group politics

reveal a direct link between fiscal exploiters and fiscally exploited: with major tax cuts implemented since the 1980s, municipal and state fiscal capacities have been drastically undercut, evolutions which proved advantageous to many white homeowners through hidden "privileges" and what is now known as the "Black tax" (Martin and Beck 2017; Henricks and Cheyenne-Harvey 2017).

2.5. Chains of Exploitation

Once we acknowledge this multiplicity of exploitative forms, the notion of chains of exploitation becomes useful to describe common, layered configurations where many agents can simultaneously stand as exploiters and exploited. The history of commercial capitalism provides a plethora of examples where "in-between exploitation" can occur, from putting-out factories to sweat-shops, or through recruiting subcontractors (Didry 2016; Banaji 2020; Bittmann 2023). This is no historical feat, as these hierarchical value chains are proving an enduring feature of contemporary capitalism, both within and across borders. Internationally, while the traditional "producer-driven" value chains persist in some industries such as car manufacturing, these have been increasingly superseded by "buyer-driven" value chains (Gereffi 1999; Gereffi and Fernandez-Stark 2016) where multinational corporations often from the Global Norths concentrate research and design, while leveraging the resulting intellectual property to exert control down the line (Rikap 2021). In this regard, prominent examples include the textile, electronics or food industries (Davis 2016, Boudreau *et al.*, 2023).

These configurations can also materialize at the local level: in the case of sex work in Andra Pradesh, studied by Brady *et al.* (2015), female workers are "exploited" by brokers, who levy "disproportionate" fees with respect to the services provided, yet they also frequently invoke local textile factories, whose poor working conditions often force them to sell their bodies on the illegal

sexual labor market. And even within the strict confines of Western countries, relations of commercial exploitation have gained weight through the "fissured workplace" (Weil 2014). This is observable both for workers - such as in the construction or high-tech sectors (Kunda 1992, Jounin 2009), through the externalization of low-skilled tasks such as cleaning or security (Dube and Kaplan 2010; Perraudin *et al.* 2014) - and in business relations, through specific juridical forms such as franchising, gaining ground in the hospitality, retail or fast-food industries (Callaci 2021). Overall, these phenomena point to a "return of merchant capitalism" (Lichtenstein 2012), and raise the issue of consumers' role within such chains, either as direct, or distant buyers or exploitative services (Brady *et al.* 2015; Ferguson 2021; Desmond 2023).

At the macro level, these trends are also consistent with data on the share of wages in value-added; the most straightforward proxy for the "degrees of exploitation". A fall of that share has been observed over the last decades in many developed countries at the aggregate level, yet not always within the average firm. Rather, in several countries, this fall seems more directly explained by a reallocation of value-added from low- to high-profit share firms (Autor *et al.* 2020; Kehrig and Vincent 2021; Bauer *et al.* 2023). Part of this shift is tied to productivity increases in high-profit sectors, yet this is also a direct consequence of the externalization of some activities, increasing the market power exerted over suppliers, and thus enabling the indirect exploitation of workers from other firms. As long argued by the theory of unequal exchange, even competitive relations between firms from the global Norths and Souths can generate equilibrium prices which lead to inter-firm exploitation at the macro-level (Emmanuel 1972; Köhler and Tausch 2002; Alami *et al.*, 2023). Increasingly, these chains also involve financial relations, with a large literature studying how "direct exploiters" can also be subordinated upstream to actors such as banks, creditors or shareholders, affecting downstream industrial relations (Amable *et al.* 2005; van der Zwan 2014). Similarly, as scholars of sovereign debt have emphasized, financial and state exploitation are often intertwined in imperialist contexts, with

post-colonial legacies translating into enduring financial subordination (Pénet and Zendejas 2021; Alami *et al.*, 2023). In sum, the aggregate economy is not simply the juxtaposition of production units, each with its own limited set of exploitative relations: individual, firms, and countries interact increasingly through complex vertical and horizontal ties, creating meshes of exploitative ridges which counterfactual analysis can help disentangle.

Conclusion

This state of art hopes to lay the groundwork for *exploitation* to turn into an applied notion, useful for empirical research. The quest for alternatives to both purely distributive (*inequality*) and relational accounts (*domination*) is becoming increasingly visible through the proliferation of conceptual substitutes, such as "oppression", "subordination", "appropriation" or "predation" (Delphy and Leonard 1992; Taylor 2019; Folbre 2020; Alami *et al.* 2023). These palpably help push discussions within subfields of socio-economics, yet their lack of analytical bedrock prevents any overarching framework to emerge. Rather, because of its characteristics and dense history, exploitation theory offers a promising path in this regard, as suggested by a recent comeback (Tomaskovic-Devey and Avent-Holt and 2019: 107-133; Desmond and Wilmers 2019, Muller 2021, Desmond 2023). Here, we insisted on three main properties that social scientists should strive to keep in mind while adopting a counterfactual approach (i.e. define a non-exploitative baseline), which allows to go beyond both Marxist orthodoxy and neo-classical baselines: exploitation analysis should be *institutional* (pay attention to the variety of exploitation arrangements), *multiscalar* (their imbrication), and *bottom-up* (grounding alternatives in actor's own, potentially conflicting normativities). To illustrate these, we pinpointed works which often do not rely explicitly on the notion but hint at convergent intuitions, often emphasizing imbricated chains. Hence, while exploitation still occurs, daily and globally, within

production units, this by no means exhausts its possible loci, and we believe that adopting such a non-dogmatic approach can help socio-economics uncover the multiplicity of exploitative structures which persistently mold both the history and present of capitalism.

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