Studying elites

Challenges, opportunities & progressive potential: innovation collection editorial

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Introduction

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In June 2022, 30 academic and civil society researchers of elites met for two days in London, UK, at an NCRM Innovation Forum titled 'Studying elites: challenges, opportunities and progressive potential'. The Forum brought together international early career and established academic researchers from across the social sciences and civil society researchers to discuss methodological approaches to the study of elites, share knowledge and strategies, and build capacity in researching elites. The Forum drew on a broad definition of elites as 'those with vastly disproportionate control over or access to a resource' (Khan 2012, 362), with a particular focus on political and economic elites. The event was organised around three themes: methodological strategies in studying elites, negotiating access and encounter, and the ethics and purpose of studying elites. The present Innovation Collection shares some of interventions and discussions during the event.

In the context of a dramatic widening of socio-economic inequality and an associated expansion of wealth accumulation among a small elite of individuals, families and corporations in recent decades (Piketty 2014), a critical understanding of who elites are, how they operate, and how they exercise their power has gained renewed urgency. Following the 2007-2008 North-Atlantic financial crisis in particular (Savage and Williams 2008), there has been a renewed interest in 'studying up' among scholars, journalists, and other civil society stakeholders such as anti-corruption NGOs and artist-activists. This 'studying up', and in some cases 'studying across', has utilised a diverse range of methodological strategies and has seen innovative experiments with established methods, including immersive ethnographies in elite industries (Ho 2009), interviews with both elites and the professional intermediaries who work with them (Atkinson 2020), mobile methods in plutocratic neighbourhoods (Knowles 2017), discourse analysis of media representations of monarchy (Clancy 2020), cohort analysis of commercial archives (Friedman and Reeves 2020), geodemographic segmentation (Webber and Burrows 2018), open-source and other investigative research (Wells 2020) and the use of alternative education and art practices (Alternative School of Economics 2020). This resurgence of critical, innovative and sophisticated knowledge production on elites prompted us to organise a Forum reflecting on how and why we study elites. Addressing the same question, this Collection is organised around the three themes that also structured the workshop: access and the availability of data; ethics and positionality; and future directions in research.

Access and the availability of data

Research on elites poses specific methodological challenges. Surveys of the general public often do not specifically sample for, and thus do not contain (enough) data on, economic and political elites to allow robust statistical analysis of this social 'minority' (Alternative School of Economics 2020; Savage and Williams 2008). Similarly, for those of us conducting qualitative research, access to the spaces elites inhabit and move through is frequently barred by gates, private security, and secretaries who sort and filter people who do not belong. However, as Mills discusses in this Collection, researchers of elites are not alone in facing challenges of access. For instance, access is also difficult to illegal networks or marginalised communities that have been let down by researchers in the past. While gaining access to elites thus certainly represents challenges, there are enough successful precedents in research to show that these are not insurmountable.

The three chapters in the first section present thoughtful considerations of access, discussing potential barriers to access and how they might be overcome. They explore the tension between those who study and those who do not wish to be studied, including, for example, the increasing ability of wealth elites to evade attention, the threat of violence to suppress research, but also the use of innovative methods and careful self-presentation to gain access to elite organisations.

In the opening chapter, 'Going dark: the depotentialisation of critical social research on wealth elites', Rowland Atkinson criticises a historical tendency for the social sciences not to study wealth elites, partly because they do not appear to have problems themselves. The risk, he points out, is that we may neglect the possibility that those groups who do not appear to have problems may yet generate social problems. While Atkinson thus welcomes the growth in research on the wealthy and powerful, he sees the recent momentum in elite studies in danger of being obstructed by increasingly sophisticated spatial and social strategies of elites to avoid scrutiny and hide evidence of social malpractice. To aid researchers in recognising and countering these strategies, Atkinson creates a typology of these new tactics of avoidance and highlights the fiscal boundary of the nation-state as one strategy to limit the harm of a footloose capitalist elite.

In 'Access and threats in the study of Central American elites', Francisco Robles-Rivera focuses on the chilling effect of intimidation and violence against researchers on the study of elites in Central America, and presents strategies to circumvent such threats. Despite radical social change over the last four decades, Central American countries have also seen the ongoing concentration of wealth and political power in a few business groups. These groups, which are often family-owned and male-dominated, control political institutions and key sectors in tourism, real estate, and other industries. Despite their disproportionate influence, Central American elites remain understudied. Robles-Rivera considers reasons for this scholarly neglect and highlights security concerns among elites, as well as systematic violence against scholars studying inequality and power as key issues. Robles-Rivera then outlines some solutions to this dilemma, such as, the use of public information to map out elite influence on fiscal policy, the state and media.

Also on the topic of access to elites, 'Who has the power? Reflections on elite studies, risk and feminist politics', presents a thoughtful and reflective conversation between Laura Clancy and Emily Hoyle. Drawing on their respective research on the British monarchy and techno-scientific imaginaries, Clancy and Hoyle discuss topics ranging from the use of covert and investigative methods to study elites, the risk of building a public profile as a researcher of elites, the ethical specificity of studying powerful individuals and organisations, the current shortcomings in institutional support for this kind of research, and the entanglement of researchers who are themselves positioned within elite institutions. Doing so, they also outline, and push back on, some of the disciplinary boundaries within which elite studies are positioned, all the while emphasising the contribution of feminist politics to elite studies.

Ethics and positionality

From the methodology sections of journal articles to ethical review forms, the normal and indeed ideal qualitative research encounter is often understood as one of deferral to less privileged research participants. However, the translation of this research norm 'upward', i.e., its application to studies of elites raises serious questions and dilemmas (Gilbert and Sklair 2018). Negotiating a power imbalance that skews in the favour of the researched can be a source of difficulty and insecurity for researchers, especially as professional training usually does not prepare researchers for this situation and institutions can be poorly prepared to support it. Also the balance between maintaining positive relations

much worry and guilt for researchers. Qualitative research with elites thus demands a careful balancing act between our ethical obligations to the individuals and organisations under study, as well as to a wider society impacted by structural inequalities that benefit these elites, which are in some cases aggressively defended by them, as outlined in Rowland Atkinson and Francisco Robles-Rivera's contributions. The chapters in this section reflect on the difficult work of balancing these ethical obligations, from various classed, racialised and gendered positions.

In ''The ethics of care': a possible tool in the field when studying elites', Pere Ayling and Karen Lillie pick up on Hoyle and Clancy's question regarding the institutional support for research with elites, to reflect on the balance between challenging inequalities and protecting the rights of participants. They further reflect on the strategic use of their positionality to gain access to elite organisations, as well as the use of their shared 'humanity' to arrive at a more nuanced portrayal of their participants. While acknowledging there is no one blueprint for ethical research, they suggest an 'ethics of care' to help researchers navigate our sometimes conflicting responsibilities towards participants and society.

In 'An ethnography of the donor education programme: access and encounter among elite philanthropists', Jessica Sklair reflects on how her ethnographic work with elite philanthropists in Brazil was dependent on her own privileged positioning as a White British woman, her family history and class position. Grounded in this personal reflection, Sklair's contribution provides engaging and thoughtful responses to what she identifies as four central questions for elite researchers: Should class-advantaged researchers take advantage of their potential enhanced access, and what responsibilities do they take into elite spaces?; How do critical ethnographers of elites present their work in elite spaces?; How do researchers of elites present themselves to gain acceptance and trust from their research participants, and how does their self-presentation shape our work?; How do researchers negotiate the maintenance of relationships with elite research participants after they have 'left the field'?

Picking up on the theme of elite philanthropy, in 'Geographies of super philanthropy: the business of giving to higher education', Pablo Fuentenebro explores the geographical and ethical consequences of major donors for higher education itself. Fuentenebro focuses on three key themes to flesh out the landscape of super-philanthropy and higher education in the US. First, he examines the geography of super-philanthropy and the rise of opaque structures such as private foundations and Donor Advised Funds. Second, he explores how the growth of big donors and the size of their gifts can reproduce privilege in already wealthy institutions, and compound the problem of under-funding at less prestigious institutions. Third, he asks who specifically benefits from large donations to higher education institutes. In his concluding remarks, he considers possible tensions between the independence of researchers and the funding priorities of their institutions.

In the final piece of this section on ethics and positionality, 'Unpacking identities: wealth elites in a luxury hotel', Ujithra Ponniah and Comfort Molefinyana , reflect on their research with Black elites in Johannesburg, South Africa, to show how the racialised, class and gender identities of researcher and researched shape their field. They reflect on how they inadvertently entered the 'sugar daddy economy' when they started their research in a luxury hotel and how they attempted to overcome this barrier to their research. First considering switching strategies to centre their professional credentials when approaching prospective participants to mitigate any unwanted sexual attention, they ultimately managed to gain access through an gatekeeper, also highlighting the significance of serendipity, patience and connections with members of staff in elite organisations.

Future directions in elite research

The central focus and future research agenda of the field of 'elite' studies are contested (e.g., Savage et al. 2015; Bukodi and Goldthorpe 2021), with researchers debating the centrality of class analysis, the specificity of the relationship between elites and power and the question of where boundaries should be drawn between elite and non-elite, among other issues. Adding to the challenge, definitions of elites in academic research are extremely broad and equally contested. When one considers what's at stake, the contestations and multiple meanings attached to the term 'elite' are unsurprising. Indeed, these definitional tensions provide one entry point into debates about the always changing organisation of power. Beyond academic research, elite has (re)emerged as a key rhetorical category in public debate and political life. Political actors frequently use and compete to define categories like 'elite' or 'the people' in ways favourable to their goals. Political actors on the left and right may thus both criticise 'elites' while advancing entirely distinct and, indeed, contrasting agendas. In other words, anti-elite discourse serves both progressive and reactionary ends, a phenomenon that in itself needs more scholarly attention. Given the current context, there is a pressing need for academic research to contribute rigorous, systematic and critical scrutiny of those 'at the top of society'. Taking up this challenge, the final three chapters in this Collection reflect on potential theoretically-informed questions, methodological directions and cross-disciplinary concerns for future research questions in the field of elite studies.

Future direction in elite research opens with Tom Mills' contribution, 'Identifying and analysing elite populations'. As Mills writes, one point of debate at the Innovation Forum was how exceptional the methodological challenges discussed really are to elite studies, compared to research with non-elite groups. As Mills argues, while the differences between studying elite/non-elite social groups might at times be exaggerated, the inversion of the usual power relationship between the researcher and the researched does bring with it distinct methodological, as well as ethical, challenges. However, to understand and theorise those unique challenges, Mills argues, we need to attend to two less discussed topics: first, the question of how elites should be theoretically defined, and therefore, how they can be identified in empirical work; second, scholars need to overcome the methodological individualism of elite studies and pay more attention to the organisations in and through which elites operate.

On the theme of organisations, in 'There is no alternative'? The role of the media in shaping public understanding of economic inequality', Sophie Knowles centres the role of economic news in serving the interests of corporate and economic elites. Her chapter addresses a central paradox: as the global economic system is becoming more complex, the public are consuming more mainstream news on these topics; at the same time, declining resources in journalism, among other factors, has contributed to a situation where the public trusts journalists less. This paradox takes place in a context of uneven financial literacy, with women and young people, in particular, excluded from access to economic and financial information, but journalists, too, having a lack of training and expertise. Given its significance, the production of economics news is under-researched and under-theorised. Knowles considers future directions for the mainstream media, researchers and policymakers in working towards a better informed public on economic inequality.

In the final piece in the Collection, 'Business elite networks: proxies, political consequences, and the impact of artificial intelligence on elite networking', Julián Cardenas reviews current approaches to researching business elite networks and outlines potential future directions in the light of rising Artificial Intelligence as both a research focus and methodological tool. On the one hand, business leaders are looking to take advantage of this technology to improve their performance; on the other hand, for

researchers recent advances in technology have made it possible to conduct new analyses of elite business networks. Cardenas discusses these trends and outlines key research avenues for future research on the impact of AI on business networks.

The 2022 Innovation Forum showed the value of reflecting collectively and individually on the methods, tools and strategies we use to study elites. It also highlighted some of the methodological innovation going on in this emerging field internationally. This methodological innovation is necessary to study a section of society that remains too little understood, considering their disproportionate power and influence in society. We believe that such methodological innovation depends on the active building and fostering of collaborative spaces and would like to highlight another output from the Innovation Forum, besides this publication. Following the event, we established an international and interdisciplinary network of elite researchers: the Elite Studies Working Group. This unaffiliated network builds community, fosters debate and encourages collaboration. The network has led to further events, including online seminars and panels drawing an audience of, at this point, 1000+ scholars of elites and members of the interested public. If you research in this area, please do consider joining us through our dedicated mailing list and website

References at the end of text

Going dark: The depotentialisation of critical social research on wealth elites

Rowland Atkinson

What are the social sciences for if not to reveal the full range of experiences of its members, its various conditions and forms. However, these goals have tended to be only partially realised. This is not, as some may believe, because we lack sufficiently detailed surveys of mobile, inaccessible or criminal groups. Rather, it is because the social sciences have tended to see apex groups and elites as being unreachable, or simply unworthy of study – either because they themselves do not appear to have problems, or else because they surely do not create them for society more broadly. The effect of this is that we are left with a sociology, a human geography, economic and political sciences, among other sub-disciplines, that examine societies as though they were celestial objects to be viewed only through fixed scopes - much remaining out of sight. To understand society in the round we must set goals and find methods allowing us to actively examine the dark side of the social. This space is not occupied by the mad, sad and the bad but, rather, by the glad (and sometimes also bad) winners whose position is increasingly one of public concern.

It is only very recently that questions of elite power and the wider impact of the wealthy have become central targets of social research. Yet, just as some kind of take-off seems possible, it seems that momentum may be stymied by the work of elites and their agents to reduce or evade contact, many of these strategies being spatial as much as social in form. None of this is perhaps surprising given the reflexive nature of social research. However, the tension between those who study and those do not wish to be studied presents new questions for a critical sociology and its ability to feed valuable insights to the public.

Social researchers have continued to examine well-trodden social problems. The risk of this is that we may neglect the question of whether those groups who do not themselves have problems may yet be generative of problems. If we take my own field of urban studies we see that issues like homelessness, segregation, exclusion and poverty remain understandably high on the agendas of researchers and government agencies. This would not be a problem if these priorities were balanced by other studies of the systemic or institutional roots of these problems, focusing less on symptoms and more social causes. Intricate and complex pathways of causation connect the well-off and powerful with those who have formed the traditional mainstays of urban investigation. These pathways may include advantageous tax arrangements, the hogging of resources (like education) by the wealthy, the unfair distribution of profits to workers (either in their factories or in other places owned remotely through shareholdings) and the capacity of capital, ultimately, to award too much to too few. In subtle ways too we can see how the concentration of wealthier groups in urban space may produce regressive effects in distant locales. These relationships have been increasingly clarified in pictures of the social world drawn by a sociology that now sees the rich and powerful as important targets, as well as the political and economic systems that support them.

In a context in which the success of social research is often driven by measures of impact, the danger of narrowly identifying the audiences of social research risks sidelining the

need for, and value of, simple public enlightenment. A general goal of informing society at large has often become secondary to the requirements of policy or corporate client groups. But in a world burning with rage over uneven wealth accumulation, a trend that has only accelerated during the pandemic and current global economic crises, we might hope that the social sciences would have more to offer its 'general' publics and to inform the play of social conversations around political questions of resource allocation.

In this short contribution, I want to suggest that the rapid expansion of research that now focuses on wealth elites, their enabling intermediaries and the structures of the political-economic systems undergirding them, has begun to reveal much about them. However, the early promise of new insights risks being tempered by the more strenuous avoidance efforts of prospective subjects and institutions – increasingly adept at closing-off contact, avoiding scrutiny and hiding evidence of social malpractice. What then might be the prospects for work on urban wealth elites given the ability of the monied to 'go dark' on the newly devised radar of social science?

Going dark, or always nocturnal?

The term going dark describes the efforts in 2022 of the crews of oligarch-owned superyachts, charged with taking them off the ocean grid by removing embedded location systems. These vehicles were at the forefront of efforts at seizing assets after the Russian invasion of Ukraine in 2022. But one of the effects of efforts to locate Russian assets was the realisation of how deeply mixed this group were, among the wealthy more generally, their lobbyists and other enablers working within mainstream politics (Belton, 2020; Burgis, 2021). For close observers this was old news. Those asking how the son of a billionaire, former KGB, owner of London's only remaining newspaper could enter the UK's House of Lords might have forgotten that even parliament itself understood that big money had already inveigled national politics and that Russian money in particular had been considered a serious national security concern (Foreign Affairs Committee, 2018; 2022). The conclusion of experienced commentators was that the UK state had moved slowly enough to allow friends to remove assets and disappear quietly (Cunningham-Cook, 2022). The perception of a problem with powerful non-government actors gave way to new questions about the state's apparent enabling of money laundering and its lack of interest in unfair tax rules for the rich. In the same year Transparency International (Whiffen, 2022) showed that half of parliamentarians were part of the powerful property lobby (Colenutt, 2020), and work on offshore ownership of UK property assets showed that London was even more full of cash from tax havens than had previously been revealed (Foreign Affairs Committee, 2022).

What used to pass as novel insight has been overtaken by a new reality as the multiplying effort of researchers to track, interview, observe and measure the forms, identities, numbers, wealth, influence and other effects of wealth elites comes to light. Burgeoning investigations of elite life, wealth, offshore worlds, the comfortable environs of the urban super-rich (Forrest and Wissink, 2017; Wiesel, 2020) and analysis of new tax and wealth data dumps (Bourne, Ingianni and McKenzie, 2022) have appeared. Alongside this work has been the invaluable efforts of investigative journalists and NGOs as they have dug beneath the surface reality of the global economy and political settings (Heathershaw et al, 2021; Beizsley and Hawley, 2022). Such work has generated tempered optimism that new and critical work might help to get to the heart of debates about inequality, its root causes and wider effects.

For some years commentators have talked about lights-out London, referring to neighbourhoods where few or no lights are on at night, or for extended periods of the year. Such ghost neighbourhoods have highlighted the palpable presence of capital alongside the more spectral presence of owners. Skeleton crews of staff have maintained the homes of the richest residents while offshore money has been used to buy assets for the purposes of laundering or to hold simply for investment. I have tried to argue that the

relationship between capital, elites, enabling groups and institutions finds particular expression through constellations of networks in city settings (Atkinson, 2020). Indeed the city itself is the core terrain within which an appropriation of politics, land, law and corporate life has occurred as the raw money-power of the wealthy has been unleashed. Space, in this sense, matters to questions of elite incorporation, social standing and the longer-term reproduction of advantage as new networks are built-up. Yet even in the short time since that work was completed we have seen many reports about the wealth elite, corruption in political life, the use of our legal system by Russian and monied litigants to silence journalists and more revelations about the scale and effects of offshore investments.

New tactics of avoidance

The oligarch's yachts were only one kind of strategy of avoiding unwanted contact or monitoring and in fact several such strategies can be identified:

Dark warehousing – This refers to efforts involving key assets, capital, shares and financial resources. Notable among these are forms of tax avoidance and evasion; the use of offshore and the deployment of wealth managers to increase investment returns across tax jurisdictions using wealth chains. This avoidance strategy thus involves well-established attempts at strategies of reducing contact with, or monitoring by, state agencies. These concerns have become enmeshed in the efforts of national governments to court capital. In the UK we have seen the new designation of what Liam O'Farrell and I (2023) have described as a form of libertecture – urban zones and buildings, such as freeports, in which libertarian principles, the activities of wealth elites and free-flowing capital are further facilitated.

Dark spaces – Another strategy of reduced public presence or extra-territoriality can be linked to urban and other spaces in which the public presence of residential life is reduced. This is evident in the 'ghost' districts of many cities in which investment capital and wealthy residents have clustered in recent years (Soules, 2021). But this kind of hollowed-out social presence can also be seen as the result of new architectural forms of enclosure, retreat and defence where gated communities and individual 'fortress' homes, ranches and bunkers have becomes strategic forms of escape for wealthy individuals (Atkinson and Blandy, 2016; Garrett, 2020).

Dark tactics – Less passive actions can also be discerned in the ways that powerful individuals have worked hard to close off forms of criticism or exposure. Much of this activity has only come to light very recently, notably in the legal measures (known as Strategic Lawsuits Against Public Participation or SLAPPS) to tie-up or financially destroy the work of journalists or NGOs investigating wealthy individuals. The most notable of these has been the use of the courts by Roman Abramovich to hobble the work of Catherine Belton, one of around 15 such cases in the preceding decade globally. Related to this we should consider the decision of the European Courts in 2022 to prevent the naming of beneficial owners of companies to maintain a right to personal privacy as a result of actions by wealthy individuals in Luxembourg. These are all active methods undertaken to take light away from the illicit role and power effects of wealthy individuals.

The potential of methodological nationalism

If such strategies of avoidance appear to be more concerted among the wealthy and powerful, how optimistic can we be that the social sciences will continue to generate new insights? Here we should note that the difficulty of researching elites has long been noted as a reason for their low profile in social studies – with social closure, spatial avoidance and network gatekeeping among such difficulties. With the arrival of a raft of studies of

wealth elites there is reason for optimism, with examples of long-term ethnographic (Armytage, 2020), accounting (Harrington, 2016) and qualitative studies emerging (Knowles, 2022) which highlight the possibilities that may result from patience, innovation and, perhaps sometimes, good prior connections. So there is certainly scope for optimism regarding the kinds of new and exciting work appearing to offer new insights and data. In this respect we might appear to be occupying a moment of expanded potential for the social sciences, and public hunger for its outputs.

Another area of concern that appears to have been at least partially addressed is the role of compliant states who have worked, either through myopic neglect (Piketty, 2020) or more overtly, to shield beneficial owners, money launderers, corporate malpractitioners, and indeed criminals for many years, often by enabling low levels of regulation or defunding the policing of financial crime (as has been the case in the UK for some years). The low level of surveillance here is also linked to historically embedded patterns of wealth management and tax avoidance strongly linked to the UK's history of 'innovative' financial infrastructure creation (Shaxson, 2011). Yet despite all of this, large scale dumps of data in a series of very large leaks (Panama, Lux and so on) have shown that even the most secret of arrangements are not always safe.

Half a century after Martin Nicolaus shot-down the complicity of sociologists with a state whose gaze was directed at the poor and the bad, social investigation today appears invigorated and more confident of the value and possibility of advancing understanding of elites and their wider effects. Only very recently we have seen work using new machine-reading techniques that have forced open official datasets which have remained more or less untapped. For example, Bourne et al's (2022) work on land registry data detailing offshore ownership has made it possible to see a far larger number of properties purchased using methods to avoid taxation or to offer secrecy to beneficial owners. This work showed that the (total amount of offshore, low-use and airbnb property in London is between 144,000 and 164,000 properties, collectively worth between £147 and £175bn.

Another example giving rise to excitement at the potential of work on the wealthy is that of Advani and colleagues (2022) who conducted research on individuals classified for tax purposes as being non-resident (and thereby avoiding significant tax burdens in the UK where they nevertheless live). This work used official taxation data to map the key locations where these 'non-doms' lived and showed that major concentrations existed in the central London boroughs. Such work goes some way to redressing the historical lack of information on this group and has helped to inform political debates on removing or reforming this classification.

Questions of wealth are inextricably linked to questions of social contribution. Such political questions are primarily addressed through tax systems operating at the scale of nations. In this respect taxation remains a fundamental responsibility of the state and one that industries of specialists resolve to work around for wealthy clients. Ulrich Beck (2007) was among those critiquing what he termed methodological nationalism in which society was considered to be essentially coterminous with the nation state. For Beck the nation state was a kind of zombie concept, still walking but one that should perhaps have died in the face of the newly cosmopolitan and interconnected global world that social subjects increasingly criss-crossed. Despite moving to a more globalised, inter-related and cosmopolitan world it is worth recognizing the enduring role of nations in acting as the primary geographies over which demands for contribution are ultimately made in the name of a social and economic community identified at the level of the nation.

Since the COVID-19 pandemic there has been a notable strengthening of borders around national economies. Supply chain shortening and economic shocks are seen as issues requiring co-ordinated responses at the national-level. While brands of conservative and populist thinking have tended to espouse the primacy of national territories, in reality

many of the policies and acts of their adherents have worked to sell local and national assets, offshore wealth and to circumvent fiscal obligations. This highlights the need for debates about wealth and tax justice to be identified at the scale of the nation (the space in which duty falls) and the destruction or fencing-off of supra-territorial spaces (tax havens, offshore accounts, cross border flows of capital) that are used to avoid such duties. We can further underline this need for national accounting and taxation by examining proposals advanced to address tax avoidance and evasion which have also been based on historical analyses of national wealth. The work of Piketty (2020) and Zucman (2015) have, in this sense, been fundamentally about the nation as the primary accounting scale or unit, from which other forms of social justice might then be made to flow through tax reform.

We may argue that the problem with a footloose capitalist elite, often working with a wealth manager in every (free)port, was not the inadequacy of local or national framings of their identity, rather it was their capacity to shift bundles of capital across nationally defined tax jurisdictions. Corporations are, of course, of major concern here too. These flows of wealth increase the value of capital through investment working across tax jurisdictions. Looking with a historical eye on these debates highlights how the porosity of nations in relation to flows of (plundered or extracted) international capital in the colonial era were fundamental to the longer-term trajectories of the global North, even as these flows were used to mollify the demands of local-national working-class communities through the development of welfare states (Bhambra, 2022). All of this highlights how a critical social science can valuably work with a strong sense of the nation as a key scale of analysis. Such an approach is valuable in relation to new debates and data framed or gathered in relation to the key political-spatial units that are the primary means by which fiscal communities are defined and thus from which improvements in economic justice can be delivered.

Conclusion

The possibility of scrutiny has appeared to generate various reactions by the wealthy and their agents to avoid it. Social researchers and journalists have told me that elite developers and those working in finance or law for wealthy clients are increasingly reluctant to talk. The crews of households, jets and yachts are helping to maintain a more emphatic privacy and the websites of elite wealth managers tell us that they are 'building fortresses' to protect their clients' wealth in increasingly hard times. Yet we can also see how sometimes quite large jumps in knowledge, data access and contact are opening new insights about wealth elites in cities even where enabling institutions and groups remain understandably defensive or quiet about how these systems work.

It seems possible that even if political and institutional reactions are mobilised by or on behalf of wealth elites, the accretion of evidence will be cumulative. Progress is like the slow fall of thousands of feathers, small additions that, when taken together, add significant weight. Whereas concentrating inequalities could be presented as an assault on fairness and social cohesion, these issues are today increasingly considered in relation to the palpable limits of growth. Longstanding questions of social justice are being given greater impetus by the increasing evidence that affluence will shatter these limits. New moral questions about whether fortunes can ever be made through individual effort without reference to the social and economic conditions that aided them, will also continue to challenge the legitimacy of wealth elites. These conditions have brought widespread public anger as well as excitement at the prospect of reimagining fairer and more sustainable social structures and conditions. This appetite for analysis and change should be served by an emphatically public-oriented social science in which we recognise less our interest in elites themselves and more the question of their wider impact.

References at the end of the text

Access and Threats in the Study of Central American Elites

Francisco Robles Rivera

Central America has experienced radical economic, political, and societal changes in the last four decades. Economically, these countries moved from a more traditional 'coffee bananas model' to one centered on non-traditional exports, services, and remittances (Robinson, 2003). Politically, the peace accords facilitated the transition from authoritarian to electoral democracies, but as we are seeing right now, not for an extended time. Socially, the new economic model reproduced the exclusionary characteristics of the old model. (Pérez Sáinz et al., 2011). The above is essential to consider because there is an agreement that the region's problems have much to do with a socio-political system that has perpetuated the concentration of wealth and political power in a few business groups around the region (Sanchez-Ancochea & Puig, 2013). These business groups are mostly family owned and control important sectors in tourism, real estate, industry, and services. Most of them are controlled by men.

"If I was not a Castillo Arzú, she admits, I would not have been able to do the interviews". Marta Elena Casaús Arzú Guatemalan elite' researcher concern

Despite this critical influence in politics and the economy, the elites in Central America have yet to be studied. This chapter explores the reasons why. First, access. In the region, the aftermath of years of violence has restricted contact with those at the top who keep their distance from society due to security concerns. Second, the criminalization, violence, and murder of thinkers and scholars interested in studying inequality and power during the social unrest since the 1960s has put a chill on research. In this regard, in this article, I discuss some personal and broader learnings about access, threats, and strategies to circumvent these limitations to studying elites.

Access: memories and negative perceptions

As every elite researcher might know, accessing the elites is difficult. In Central America, social and political violence shaped the access of those at the top. During at least 40 years (1960-1996), elites in Central America were a military target of guerrilla movements. When the elites allied with authoritarian governments, the status quo proved to be a good business for them (Anderson, 1961). During this period, elite families experienced terrible traumas regarding the kidnapping and assassinations of family members in El Salvador, Nicaragua, and Guatemala. Seeking protection, elite families migrated from the region to the USA. They were educated and socialized in a different culture and context. Once the peace accords were signed, most families returned to the region but kept their distance from the rest of the population.

Also, in the case of El Salvador and Guatemala, the relations between Public Universities and guerrilla movements caused mistrust among elites. For elites, Public Universities were the birthplace of communist and radical thinkers. Elites founded their own universities or financed business schools in the region to avoid this alleged radicalization of education. This goal was achieved through curriculum and teacher selection and control. The negative perception among elites restricted access for those working at the Public Universities in the region. This negative perception also exists in Costa Rica, despite the fact it never experienced the social and political violence of neighbouring countries. This might be explained by the "anti-communist" ideology of Central American elites. Ideology since the Cold War has unified elites against the sense of a threat from powerful leftist groups (Bull, 2014).

Coming from abroad: my access granted

While doing my Ph.D. between 2015-2019, access to elites was granted by my email account. At that time, I was not a scholar from any Central American University but a Ph.D. student from the Free University of Berlin, Germany. Coming from abroad to interview elites was not seen as a threat but as a compliment. Europe, what a delightful and inspiring place to study abroad. As Benedicte Bull (2022, n.p.) observed: "...coming from abroad gives you special access to the elites because you are not seen as a part of the national politics. They do not know you, and you will be leaving the country soon".

Out of national politics and coming from Europe, I was not seen as a "communist" threat. On the contrary, to two of my elite informants, it was a chance to talk about their experiences studying in a German School in Costa Rica and their education in Germany. It was also an opportunity for one of them to test my German. So, our first interactions were about the German language and culture. For another informant who spent time as an ambassador, the interview was an opportunity to talk about what it means to be a "Costa Rican" in an international context and what my "duties" as a Costa Rican were. I received the same access in El Salvador. After sharing some emails with an important media tycoon, he let me know he was studying a Spanish medieval author and gave me access to his friends and business partners. In El Salvador, my access to elites was easily given because they did not perceive my research as a threat. In Costa Rica, elites thought we were sharing social capital, given my experience in Germany and as a Costa Rican living in Europe.

Threats: do not disturb the status quo

The fall in popularity of elite studies might be related to violence against universities, scholars, and thinkers since the 70s. Contrary to what we might expect, the violence against scholars did not end after the peace agreements. On the contrary, in the last couple of years, authoritarian governments with the silent support of elites are back in business in Guatemala, Nicaragua, and El Salvador. In this chapter, I outline at least three different threats scholars studying elites face in Central America.

First, scholars working in sugarcane, mining, pineapple production, or "hydroelectric plants'' face intimidation, digital harassment, and physical violence. In one case, a scholar researching a giant food corporation was kidnapped and threatened to make them stop the research. These sectors are critical for elites, not just because of the economic revenues, but because they provide elites with strategic value: control over the land (Sveinsdóttir et al., 2021).

Second, an elite-dominated social-political system which concentrated money, political power, and resources in the hands of elites has reduced state capacity and weakened

institutions (Sanchez-Ancochea & Puig, 2013). In part, these inequalities have been secured by a media system that has echoed and legitimized elites' privileges while constraining opposing voices in the public arena (Rockwell & Janus, 2003). Considering their control over the media in the region, when elites are challenged, they have been able to put into place intimidatory public campaigns with consequences for the reputation, security, and mental well-being of researchers.

Third, the need for more support from universities is the final threat facing scholars of elites in the region. Elites' influence has reached every part of our societies, including Public Universities. University staff face pressure from colleagues to promote elites' views about what should be researched and taught. For instance, when research has attracted attention on wealth concentration, inequality, and elites' power, universities have questioned or dismissed researchers because of the "bad publicity" with the private sector or the government. The above has reduced the incentives and the spaces for scholars to research these sensitive topics.

What can be done?

So, is it impossible to study elites, their influence, and their networks in Central America? No. We have shed some light on different topics related to elites in different papers. For instance, in a recent paper, Inés Nercesian and I (2022), explored to what extent Central American elites constrain tax policies implemented during COVID-19. Using novel data sets of cabinet trajectories and tax policies implemented in Central America, we offered an in-depth empirical comparative analysis of the elites' trajectories and resources (revolving doors), state capacities, and policy implementation. Using public information, we built the economic, educational, and job careers of the ministers in each country. We collected basic info such as gender, age, and education, but also information about the public/private companies ministers have connections to, for instance, whether they were an owner of a company or appointed director of a private company, and the capital origins of these companies (national, or transnational).

Public information about elite trajectories allowed us to trace when and where elites crossed doors between public and private spheres. For instance, findings suggest that many revolving doors influence policy making among economic and political elites in Guatemala. In Costa Rica, revolving doors are crucial to controlling policymaking in commerce, economy, and finance. Also, the capital origins of the economic elites in the government suggest differences between Central American capitalism (maquilas and agriculture) and South American capitalism (natural resources, transnational capital). Our findings also show that in Guatemala and Honduras when state capacities are weak and elites' capacities for influence are strong, the policy response is regressive. Elites could access and influence the Guatemalan government with policies that focused mainly on debt and tax reduction. In Honduras, elites defined the policies with the government to attend to the crisis and veto wealth tax proposals. Second, when there are weak state capacities and inter-elite conflicts, such as in El Salvador, the policy responses are used as a control mechanism. In El Salvador, while the Government of Nayib Bukele negotiated individually with a group of Salvadorian elites, it also sought to legally prosecute the president of the largest business association due to his opposition to the government. Furthermore, where state capacities are strong but elites are cohesive, such as in Costa Rica, policy responses favor the fiscal status quo. In this case, the economic elites' hegemony and economic control helped the government secure an austerity program that kept wealth taxes out of the national debate.

In another project, Julián Cárdenas and I (2021) explored the relationship between corporate networks and business influence to figure out the conditions of state capture. State capture is a specific situation in which business influence reaches a point at which economic elites exercise control over political decision-making. We analyzed corporate networks through interlocking directorates in three Central American countries –

Panama, Costa Rica, and El Salvador. We used social network analysis (SNA), pinpointing the relationship between the structure of the corporate network and two corporate political actions: contributions to presidential campaigns and revolving doors. SNA allowed us to map and scrutinize the invisible relations between elites and corporations. Research on corporate networks showed that connections among directors of top corporations are a mechanism to organize business interests and generate opportunities for political action (Carroll, 2004; Mizruchi, 2013; Murray, 2017; Useem, 1984). Public corporate information showed that corporate networks were fragmented in the three Central American countries, except for a well-connected business cluster in Panama. The organization of business elites based on a single cohesive business cluster could facilitate coordination to finance political parties, which gives them more strength to demand government posts. On the other side, the absence of connections between business elites makes it difficult to reach agreements and weakens business influence. Findings suggest that networking among some (not all) business elites can be a source that precedes state capture, as it organizes access to the state through the collective mobilization of resources and coordinated action planning.

Finally, in a comparative paper, I studied how elites seek to capture media during electoral campaigns in El Salvador and Costa Rica (Robles-Rivera, 2020). Over the years, during which many media outlets faced considerable economic hardship, Latin American tycoons, aware of the media's role and influence in politics, started to purchase traditionally family-owned media holdings. These purchases have turned the media into "the new toy of the richest" and have restricted one of the most critical media functions: providing checks against abuses of power (Stiglitz, 2017). Considering that tycoons have particular perspectives that differ from the rest of society, the media has become a strategic tool for pursuing individual wealth over collective welfare (Freedman, 2016). Based on interviews with elites, media tycoons, and journalists, the paper shows that when they feel threatened by progressive political parties, elites have four strategies to capture the media. First, economic strategies: these are related to the elites' capacities to (re) allocate money (legally or illegally) in media to modify or change the production and distribution of information. Second, political strategies: elites use superior information access and expertise via business organizations, think tanks, commentators, and lobby campaigns to influence what is reported in the media. Third, violent strategies: by relying on physical force, violence or intimidation, elites seek to shape what the media and journalists will report on. Violent strategies are an effective way to reduce accountability and allow the emergence of non-democratic ends. Fourth, ownership: through the ownership of media or the interlocked networks among media owners and elites, the latter can veto media content that questions socioeconomic structures and elites' interests. These four strategies illustrate tools and goals that can help build a more detailed framework for studying elites' influence on media. The given definition of these strategies allows us to understand which actions and resources the elites may need and what structural context would facilitate media capture. The differentiation between strategies and actions does not necessarily deny that these overlap, on the contrary, it allows us to understand when elites may seek to act to censor (i.e. through ownership and violent strategies) or to build consent (i.e. through political and economic strategies) .

Despite the challenges commented on at the beginning of this paper, some resources can help study Central America's elites, whether public information about political elites or corporate boards. The most challenging issues is gaining access to them. Nevertheless, many economic elites use social networks (Instagram, WhatsApp, Facebook). These social networks can offer information on their ideas, thoughts, and perceptions about politics and the economy. The above does not prevent personal risk in a region where impunity is the norm. However, the study of elites is critical due to their role in constructing our societies. Despite the region's small size, the differences between national elites are significant. Why this is so and how it might impact the development of more democratic societies in the future are essential questions that need to be addressed.

References at the end of the text

Who has the power? Reflections on elite studies, risk and feminist politics.

Emily Hoyle and Laura Clancy

Introduction

Emily Hoyle and Laura Clancy are both researchers of elites working at Lancaster University. Emily's research focuses on the reproduction of power relations in transhumanist imaginaries, with a focus on masculinity and whiteness in technoscientific imaginings. Laura's book, Running the Family Firm: how the monarchy manages its image and our money (2021), explores the British monarchy, wealth, power and inequality. We offer our reflections on elite studies as a conversation, discussing power relations, access, researcher positionality, ethics, and the potentialities of feminist politics.

Emily

I think risk is a methodological struggle for elite research, studying up or studying power, because we are exposing and examining various power relations that we are positioned in, but in new ways or at least in ways that could be considered less established or niche in sociological research. Some I think are physical risks. If you are entering a space of people that have powerful social and material resources, they might have control over that space, which would have been the situation had my original fieldwork been realised. I had planned to undertake partial covert observations at annual transhumanist events that are choreographed similar to conferences, with key speakers and an audience to witness and participate in bringing transhumanism imaginaries into being. From previous research I was confident that the majority of attendees would likely be white, cismen, above the age of thirty, with middle to upper incomes (as freezing your head can be costly). My proposed method would mean only the gatekeepers, the people who could grant me access, and the speakers would have known I was a researcher. I would have entered the field partially covert, but a speaker or someone who knew I was there as a researcher could have identified me to the attendees and probed my critical position. I would be entering that space as a young woman, or at least as someone perceived as younger, and, therefore, I had to think about whether the gender and age differences could have any implication on my safety as a researcher. However, my shared whiteness and my age and gender difference might have granted me access so in that sense I am benefiting from racialised and patriarchal power relations.

As a feminist researcher, I intend to enter these spaces with a critical position to research power relations specifically. There is a history of women with men as their participants (Arendell 1997; O'Neill, 2018; Zurbriggen 2002) who have thought critically about how women research men and some who have encountered various risks specific to power relations of

gender. Some of those risks can be harassment and intimidation. Participants might want to take the research beyond the boundaries of what you deem the field and they also might have access to your information and continue to contact you. So you try to negate risks that participants could bring on to you which can be specific to studying powerful people. I was careful to write in my consent form that any communications that I had with any gatekeepers before or after the events would be part of my data collection to negate certain risks. There are also risks outside of the fieldwork, so when it comes to publishing, how will publishing affect your access at a later date? Also, from online harassment as well. I am interested to know what you think about the kind of post-publication risks and the potential of online harassment that can happen when you are studying forms of power.

Laura

I agree. I think that also speaks to the kind of methodologies we want to use. In my case, I'm essentially analysing an organisation, so in theory you could do an organisational analysis. But I didn't get access to the British monarchy, and I probably never will! For me it was about coming up with alternative ways of analysing an institution. So that was, for example, using investigative journalism methods: corroborating stories, digging through different documents on official royal websites, government websites, websites attached to their property portfolios, newspaper reports and social media posts. These kinds of documents are not made easy to find, by the way, and that impedes this kind of research, which is another interesting aspect. And for you, of course, using covert research, a lot of ethics committees have a lot of concerns about that, for good reason. But for us, if that's the only way you can get in to analyse elite groups, then does that mean we're not allowed to look at them? I think exploring alternative methodologies and having that supported by ethics committees or peer review is really important.

I think your point about post-publication is also important. On the one hand, you've got universities that are encouraging you to have a social media presence. They want you to have this academic 'public persona' (Lupton, Mewburn and Thomson, 2017), but that doesn't necessarily go so well when you need to stay under the radar to access elite communities. There's a real risk in exposing yourself within these spaces. Actually, I wanted to ask you about this... I've been very explicit about being anti-monarchy, which in some ways has worked well for me, in other ways it hasn't. I'm now at a point where I'll probably never get access to official royal archives! That's a decision I made, and I stick by that, but I know you've also thought about this.

Emily

It can be useful to have an online presence, but then... well, I have often thought about how much I say about my thoughts on transhumanism online. Or what I am doing in my research, which is taking a critical feminist position as I examine power and culture in transhumanism imaginaries. I made decisions not to say too much, and even to the point of thinking about institutional websites. Not having too much information about my research in order to kind of have access to spaces and information, while also trying to avoid any potential hostility. The mythologising and misrepresentation of what gender studies is also means being online can be a hostile place for a researcher interested in gender.

As well I think what you were saying at the beginning about methodologies. Part of studying up or studying power is giving value to methodologies that do not use traditional forms of data collection. I think that is an important part of our work. How can we think creatively about methods but also how do we give value to methodologies that do not have direct access to participants? Because even if we interview powerful people, it doesn't necessarily mean that we are going to derive data from them anyways. It is also a possibility we might just elicit responses that would just cast them in a flattering light (James, 2018). I have always liked Vicki Mayer argument that studying up involves f**king up (Mayer, 2008). From her experience of interviewing "the top brass" of a production company she said the interviews became less useful higher up the chain because they would just verge into soundbites of press releases (p. 145). So interviewing alone might not necessarily be the most useful form of methodology either. I thought critically about whether participants should be automatically anonymous. Does that change when we study people with social and material resources? Should they be accountable for what they say and their ideas?

Laura

Yes, exactly: are they just telling you what they want you to hear? For instance, I was thinking, if I just report on what they said in interviews, or if I go and speak to the Royal Communications Officer, what would they tell me that would be revealing? We can't necessarily rely on their account because they've got their own vested interests. I think we have a responsibility as researchers to take that seriously. What you were saying there about gender - that's really about our own politics of what we research, and the fact that we're often doing research on topics that we don't agree with morally or ethically. We're giving participants space to tell their own story, but lots of these people are very powerful and tell their own story every day (Yanagisako, 2002). So are we actually doing anything to challenge power? I would say that it's part of my role as a sociologist to challenge dominant narratives. Perhaps it's about not centering their account, but then also not misrepresenting them. That's also important - we have a responsibility there as well. We don't want to twist what they're saying to fit what we think they should or should not be. There's a real politics there in terms of our own investments in disabling some of these power structures, vs. being an ethical researcher in terms of representing a participant.

Emily

You have made me think about how it is an intervention into how power is being made. Something I have butted up against is how through the ethical institutional process we risk almost reproducing these people as powerful ourselves because we are constantly having to identify them as powerful. I've always tried to at least just make it visible that power is not innate to these white men. They do not somehow have power within themselves but rather it is being made through relations and that is what I am trying to understand and intervene in. I felt that while I was going through the process of getting ethical approval and even writing my methodology, I was tripping over this sense that I was constantly reproducing my subject as powerful. I understood then that my thesis, my own research, is part of a politics of knowledge production that has the potential to reproduce or legitimise certain ideas as powerful. I do think this is a particular struggle of studying upwardly or studying elites in that we have the potential to, like you are saying, give voice to these ideas, especially because we may ourselves be in

powerful institutions. My subject gains from academic legitimacy. At the same time, I'm trying not to render myself as powerless as a researcher, which I think is what you are saying about misrepresentation. It is not helpful to just see ourselves as innocent researchers who are always positioned downwardly to our subject. As I said right at the beginning about physical risk, I'm not necessarily rendering myself as an innocent or vulnerable subject because I am a white woman. This is the politics of trying to do this work of looking at forms of elitism and forms of power.

Laura

One thing I've really struggled with is presenting my research to participants in a way that makes them want to take part. So, you know, making it appear valuable for them and something they want to be part of, but also not lying about what you're doing. I think that's an art in elite research. You're not tricking them, but also you do need to be very careful or you're not going to get them in the door. I haven't found a way to balance that yet. I suppose it links to what you just said about power relations, because researchers do have power, in that we're responsible for representing these things and we publish peer reviewed research, so we have a responsibility not to "trick" anyone.

Emily

Yes, what you said reminds me of Perry Ayling and Karen Lillie's paper 'Revisiting the un/ethical' (2021). The tensions of inhabiting what would be considered an unethical position in order to be able do this kind of research. I think the un/ethical position is made visible in methodologies with covert observations. When I started thinking about covert observations as a possible methodology, most sociological texts that I read gave the advice "do not do covert observations, it is unethical, you are concealing too much from your participants." However, I felt strongly that partially covert observations can be an appropriate and useful method in circumstances when your subject acts secretively. I had to find an ethical position to do this type of method. I couldn't deceive anyone, but I might not reveal myself at the same time. If someone at the event asked me who I was, I would have told them, but if I'm not directly asked the question, I wouldn't have revealed myself as a researcher. I find that quite difficult as a feminist researcher, because we are here to intervene and like you said, we do have these critical positions. When we choose not to reveal ourselves as feminists, what does that mean? I'm not sure there is a clear answer and I think this is all part of the struggle, the methodological struggle of doing this work.

Laura

I feel a methodological struggle in how we approach things too. I've done interviews with Royal Correspondents, and one thing I had to do was say that they could read the interview transcripts afterwards and remove things that they didn't want included in the project. And that's difficult as a researcher, because of course you gather all of the data, and it was good data. The ethics committee weren't delighted. But I had to offer them that in order to get those interviews in the first place. Similarly, recording – what if they don't want it recorded? Well, the risk is you miss data, but the alternative is you don't speak to them at all. There's something around the adaptation of these methods so they suit studying up.

Emily

Yes, I agree. I think the discomfort ethics committees might have with the methods we might use to study elites or study power-in-the-making is interesting; the different adaptations to ethical applications you must make in order to get access. Similarly, to what you were saying about recording. Using a recorder when doing covert observations is loaded with all sorts of ethical implications. How might a recorder identify me as a researcher but also is it ethical to record people without their knowledge? Is it always the best way of collecting data? I was interested in how power relations were being made in these cultural sites. Can you record it? Is it audible? So how do we investigate the things that we are looking for? How do we find and make visible what elitism is or what power is? Especially when it is kept hidden and can be invisible.

I proposed that I would collect my data using handwritten notes, which also has ethical implications. I need to make sure I am accurate when I take notes and transcribe. I see this as adapting sociological methods. I do not want to confine covert observations to the history of sociological research – I believe it still has a place in our methods. This is why the Elite Studies Working Group is so important, the discussions like we are having can be a useful resource. From my experience, if you are an early career researcher who wants to research people with powerful material or social resources, or study patriarchal power relations 'upwardly', it can feel like there is no framework or practice to lean against for support. It can feel isolating when your peers do not seem to have the same kind of questions around their methods. I remember when I first started doing my PhD and I was talking about my project and I had mentioned that I have to consider a potential hostile audience. I was told that wouldn't be the case. Well, what if it is? There could be more institutional support, universities could support researchers who want to look at power much more, I think.

Laura

I agree. There's lots of things that they could look at - ethics procedures are one. Even our ethics forms aren't designed for elite research. Maybe ethics committees could reflect on that, but also work with researchers who have done this research to think about what could be done differently. I think there's also a lot to be said about the institutions understanding the risks, and understanding that it can become a personal risk. You spoke earlier about gender, but also for researchers of colour and other intersections, there are very particular risks that need to be understood. Universities and publishers need to take some responsibility for that, during and after publication, if they are benefitting from this research. For example, you might need legal help, help in phrasing a particular publication so you're protected. We're not trained in that as sociologists.

Emily

Yes, absolutely. How can we be trained as sociological researchers to navigate these potential risks? Financial, legal, physical or personal. And how does the lack of framework or training keep people out of this type of research? People might be interested in this research, but because of various risks cannot undertake elite studies or study power - and that in itself is how power is functioning. How is power maintained through difficulties in access

or the threat of being liable, doxed, or harassed. All sorts of different potential risks can keep power in place. We are always entangled in these different forms of networks and relations as well, even in our own institutions.

Laura

And institutions and the people running them are also, in their own ways, elites. There's something interesting about our positionality within an elite institution studying another elite institution or individual – these power relations interacting. And what that means for how your research is received or published and so on.

Emily

I'm researching masculinity within a masculine institution but using feminist tools, so I feel I am constantly trying to reflect and disrupt power relations all the time. Part of my work is finding different ways of doing and thinking within the confines of a masculine tradition. I consider myself a feminist STS researcher and... STS does not feel at home in elite studies even if Bruno Latour (2018) did think about elites in Down to Earth. But STS can and should study forms of elitism, right? Especially given the rise of the billionaire tech founder. So I am trying to push against certain boundaries, including disciplinary boundaries. You can't get away with all rebellions but, yeah, I try not to reproduce the patriarchal power of my institution while also being in the institution at the same time.

Laura

That's what's so specific about being a feminist in this elite studies space. There's been lots of great feminist elite studies work (Yanagisako, 2002; Bear et al., 2015; Glucksberg, 2018; Mears, 2020). Our particular experiences and expertise lead us to think about these things in a slightly different way, I think, and that's why feminist frameworks on elites are so valuable.

Emily

You can't leave your feminist politics outside of the field, you're always taking it with you.

References at the end of the text

The 'ethic of care': A possible tool in the field when studying elites

Pere Ayling & Karen Lillie

Introduction

Edwards and Mauthner (2012, p. 14) describe research ethics as 'the moral deliberation, choice and accountability on the part of the researchers throughout the research process'. As such, research ethical codes are designed to provide researchers with guidance on what is 'morally right or wrong' when undertaking empirical research (Barnes, 1979, p. 16, as cited in Heath, 2009, p. 23). These codes grew out of instances of a clear disregard for morals when conducting research – for example, during Nazi experiments in concentration camps – which led to the formalisation of such ideas as informed consent and voluntary participation (Mandal et al., 2011). Today, it is the accepted norm that all social science research with humans must adhere to conventions like informed consent, confidentiality and the protection of participants from physical or psychological harm (BERA, 2018). Indeed, adhering to and reflecting on conventional ethical principles is not only critical for gaining approval from university ethics committees, without which one often cannot conduct research, but also considered a hallmark of good quality research (Heath, 2009).

"... elite studies scholars should be bound by a different set of ethics, one that aligns not with the interests of participants, but with the interests of society"

Despite their importance, there is a growing concern that conventional ethical guidelines provided by ethics committees do not sufficiently help researchers navigate what King (2009, p. 8) describes as 'unanticipated ethical, social and political challenges in the field'. One reason is that when it comes to actually doing research, there is a limit to which ethical quandaries can be anticipated and which appropriate action plans can be created in advance. Another reason – and the one we focus on here – is that some research departs from the typical configuration of researchers being higher in the social hierarchy than their participants and thus, the assumption goes, able to convince participants to take part in something against their own interests. In elite studies, for example, which investigates those who not only have vast resources but also control both access to and valuations of those resources (Khan, 2012), participants are the ones in positions of power. Elites are at low risk of being taken advantage of in the research process since, typically, they have the resources, confidence and knowledge to advocate for themselves. That, in addition to elites being implicated in the creation and maintenance of inequalities, has led to the suggestion that elite studies scholars should be bound by a different set of ethics, one that aligns not with the interests of participants, but with the interests of society: two sets of interests that, in the case of elite studies, are often at odds with one another (Gaztambide-Fernández, 2015).

A previous paper of ours (Lillie & Ayling, 2021) reflects on the important and not-so-straightforward question of which kinds of ethics are most appropriate when studying elites. We theorised some of the particular ethical challenges we faced in doing this work as well as some of the tensions that arose for us in the field, as a result of having both a strong desire for social justice and a commitment to the rights of our participants, regardless of their socio-economic and political power. In the paper, we acknowledged that current ethical guidelines do not always capture the particularities of the ethical challenges one encounters in elite studies work, but also argued that bending those guidelines or even creating new ones for this subfield of research is not an appropriate way forward. Doing so, we feel, could create hierarchies within the academy, separating those who must follow conventional ethics from those who are excused from doing so, and potentially make it less likely for elites to participate in our research in the future, damaging the long-term health of the field (see, for instance, Gibson, 2019).

As a complement to our first article, then, this chapter reflects on a tool that may be useful in the field when doing elite studies research, when balancing interests in both dismantling inequalities and protecting the rights of participants: the ethic of care. In the first section, we offer a brief, critical description of the 'ethic of care'. In the second section, we draw on our experiences in the field to explain how adopting this ethical principle encourages researchers to be both reflexive about and attentive to relationships in situ, leading to more nuanced understandings of the phenomena we study. We conclude by arguing for this situated ethical approach as one that can be tailored to these complexities, wherein ethical decisions remain committed to the tenet of 'do no harm' and yet simultaneously allow us to pursue social justice ends through our research.

A brief introduction to the 'ethic of care'

Mert (2013, p. 79) describes the ethic of care as an ethical approach which 'takes relationship to be the fundamental unit of moral analysis and prescription'. A moral theory, the ethic of care was developed by Carol Gilligan (1977), feminist and social psychologist, in response to and critique of psychologist Lawrence Kohlberg's 'ethic of justice' (Li & Li, 2021, p. 110). Kohlberg (1969, 1976) had theorised that there are three main transitional stages (preconventional, conventional and postconventional) of moral development and that attainment of the highest stage, that is, the postconventional stage, is contingent on one's ability to apply universal moral principles such as fairness and impartiality 'to abstract features of ethical situations' (Simola, Barling & Turner, 2010, p. 180). However, girls tended to appear deficient in moral reasoning when Kohlberg's theory was applied to them. Gilligan argues that this was because Kohlberg had constructed his moral development stages solely on research with boys, who are often raised and socialised differently to girls. In her subsequent qualitative research, Gilligan found that girls instead often take a different but equally valid approach, one that takes context and interpersonal relationships into account when solving moral dilemmas.

Gilligan thus put forward the 'ethic of care' to highlight this approach – one that sees truth as subjective rather than objective, intertwined with situational nuances and the construction of narratives (Held, 2006). Feminist researchers who have been influenced by this approach thus tend to give due consideration in their work to interpersonal relationships and interactions (McCloskey et al., 2021; Metz; 2013; Simola, Barling & Turner, 2010) – and, more specifically, to 'relations of trust' that are built between researchers and their participants (Held, p. 72, emphasis added) – when addressing ethical dilemmas in the field and in their analyses.

The ethic of care is, of course, not without criticism. For example, Miller (1991) argues that the approach is Western-focused and therefore not necessarily applicable to non-Western contexts (McClosky et al., 2021). Nevertheless, as Held (2006) points out, the

significance of Gilligan's ethic of care is in demonstrating that there is an alternative to the 'ethic of justice' perspective that prioritises the application of universal moral principles to ethical issues without consideration for context and relationships.

We would like to put this approach forward as a possible tool for those doing empirical qualitative research on elites, particularly when access and data collection is negotiated through relations of trust with participants, and when analyses take context and subjective experiences into account (Reich, 2021). Adopting the ethic of care means being 'reflexive and deliberate' (Reich, 2021, p. 578) about the power that we, as researchers, hold over how we engage and represent our participants – even as we are simultaneously confronted by their broader social power and role in social inequalities. As Reich (2021) highlights, this reflexivity is especially critical in an age of digital technology, when the information we collect and publish can spread fast and furiously, democratising knowledge, yes, but also opening up new avenues for its misuse.

Positionality and 'relations of trust': Our experiences in the field

In what follows, we reflect on how we used our positionalities in the field in strategic ways to create relations of trust with our participants. We proffer that such a relation of trust forged during fieldwork could not only compel us to look at our dataset from the point of view of our participants but also draw on our 'humanity' as 'necessary for a nuanced portrayal of our participants' (Dunbar, Rodriguez & Parker, 2002, p. 287). This poses the broader question of whether and how using an ethic of care approach could inform a reflexive and trust-based methodological approach, ultimately enhancing our understanding of the nuances at play.

Both of the authors conducted qualitative research with economically elite groups. Ayling examined the consumption of international schooling by Nigerian elite parents and the role that British private boarding schools play in the construction and reproduction of elite identity formation in post-colonial Nigeria (Ayling, 2019). Using semi-structured interviews and questionnaires, she gathered data from Nigerian parents in Nigeria (consisting of 21 elite parents, 4 middle-class parents, and one working-class parent); gatekeepers, namely, teachers and headteachers of British private schools in Nigeria and England; educational agents and consultants; and a British consular official in Lagos, Nigeria. Lillie took a sociological and historical approach to the study of transnational elite class formation at one of the most expensive boarding schools in the world, in Switzerland, arguing that the economically elite young people there were not becoming 'citizens of the world', as the school professed, but rather national citizens in a world economy (Lillie, 2021a, 2021b). Her data drew from observations at the site collected over 15 months, interviews with students and administrators, and analyses of archival data.

As a Nigerian studying elite Nigerian parents, Ayling could be described as a 'cultural insider' (Ganga & Scott, 2006). However, following a couple of unsuccessful interviews in which parent participants were very unfriendly and reticent to explain their reasons for sending their children to private boarding schools in England, Ayling realised how the strategic use of her positionality as a 'British-trained scholar' could change parents' attitudes towards and perceptions of her. After sharing that she had done both her undergraduate and postgraduate studies in England and that she was also a lecturer at a university in the UK, Ayling observed that parents' attitudes towards her changed from snobbish to friendly. Playing up her British-trained scholar identity also resulted in parents changing their initial perception of her as a locally trained academic researcher to a more 'knowledgeable Western[er]' (Herod, 1999, p. 317) worthy of their time, trust and respect. Having gained that trust and respect, Ayling noted how parents became more relaxed and forthcoming with their stories.

On reflection, Ayling conceded that there is a possibility that gaining her participants' trust, even if duplicitously (Morris, 2009), coupled with the fact that she was also a mother of two young children at the time of her fieldwork, may have compelled her to examine these elite parents' decisions to educate their children in private boarding schools in the UK from the perspective of parent-child relationships. This was a significant shift away from a Bourdieusian analysis (which was her main theoretical framework) through which parental school choice decisions are often framed within class struggles for power and privilege. Examining her data through the lens of parent-child relationship could be seen as Ayling drawing on her 'humanity', which then in turn resulted in a more nuanced analysis of her data. For example, findings from her study showed that whilst the desire to reproduce their class position was the prevailing motive, the elite parents were also motivated by notions of parental love, sacrifice and responsibility (concepts that take on specific meanings in societies that are governed by neoliberal principles, such as Nigeria).

Lillie was a professional insider at her field site, where she had worked as a college counsellor, helping students apply for and navigate the transition to higher education, and as a member of the residential staff. She felt very reliant on this positionality in securing interviews with students; she felt that because they knew her, and because she had held a pastoral role at the school, they were willing to 'return the favour' by participating in her research. And, of course, she did not want students to complain to the Head of School about the interviews, who had the right to withdraw consent for Lillie to do research there. This led to some uncomfortable moments during interviews, when students expressed ideas that functioned to uphold the social inequalities and constructed hierarchies that they were very much a part of. However, she did not challenge or push them, mostly out of fear of the possible consequences that doing so might hold for her data collection.

In retrospect, Lillie feels it would have been beneficial to have experienced these moments not through the lens of participants stating elitist and ethically-questionable views, but rather through that of young people (aged 17 or 18) working through their understanding of their world, which, to that point, had taken place almost entirely in a 'bubble of privilege' (Maxwell & Aggleton, 2010), with someone they trusted. Seen in this way, it becomes a 'privilege' that these young people expressed what might have been their still raw and developing ideas of the world, rather than a burden. This might have also changed Lillie's experience of her data analysis and write-up stages (though, probably not her findings), in which Lillie often struggled to portray her participants as fairly as possible, driven again by fear of reprisal rather than by the nuances that she knew applied to each of them – particularly, as young people.

Concluding thoughts

We are strongly of the view that conventional ethical principles should be applied in all forms of research, even when studying elites. We acknowledge, however, that it is not always easy to find an ethical code that speaks to the complexities of elite studies research. The 'ethic of care' may thus be a useful tool in the field, one that helps us navigate between the responsibilities that we have towards our participants and those we feel towards society. This approach not only makes room for situated ethics – meaning, the taking of context into consideration (Heath et al., 2009) – but also places that context, and our positionality in it, front and centre.

While we hope that our reflections in this chapter will be useful to other researchers, our primary goal is to further open a conversation around ethics in elite studies research. There is no one approach, no one right answer. We aim, then, not to offer a blueprint for meeting ethical challenges in the field, but rather to inspire further debate around this fundamental, yet rarely discussed, aspect of doing research.

References at the end of the text

An ethnography of the donor education programme: access and encounter among elite philanthropists

Jessica Sklair

This short text explores issues of access and encounter in elite research, drawing on my experience carrying out ethnographic research as a White British woman among elite philanthropists in Brazil. The text begins with a brief introduction to the elite spaces in which this research was carried out, and is then organised around the following four questions: Should researchers more easily able to access elite spaces take advantage of this, and what responsibilities do they take into these spaces?; How do critical ethnographers of elites present themselves and their work in elite spaces, and what ethical and methodological challenges are bound up in these processes?; How do researchers of elites manage factors that feel necessary for acceptance and trust building among their research participants?; How do researchers negotiate the maintenance of relationships with elite research participants after they have 'left the field'? I do not attempt to provide answers to these, but rather use them as prompts to explore and reflect upon issues that I have encountered in these spaces.

The research resulting from the ethnographic encounters I discuss below has explored the ideological underpinnings of elite (corporate and family) philanthropy, and specifically, the shift away from more traditional, paternalistic forms of philanthropy towards philanthrocapitalist and impact investing practices in the Brazilian context. In particular, it has examined how these changing forms of philanthropy reflect and support the attempts of elite Brazilian families to preserve and grow their wealth, and to make necessary adaptations to ensure survival of the corporate and financial practices through which their wealth is accumulated, in the face of changing family dynamics and wider political and economic pressures (Sklair, 2022, 2018; Sklair and Glucksberg, 2021). This work has formed part of a broader research agenda on the changing role of the private sector in international development (see e.g. Sklair and Gilbert, 2022).

While I have also drawn on other research methods (particularly semi-structured interviews and ethnography in a variety of other elite settings), an important methodology for this work has been participant observation of donor education programmes in Brazil (and I have also taken part in similar programmes in the UK and the USA). I have participated in around six of these programmes since 2006. Donor education programmes are one among a slate of philanthropy advising services that have emerged across the philanthropy sectors of many countries (including Brazil) over the last few decades. They are usually designed and run by non-profit philanthropic intermediary organisations, although financial advisors (offering philanthropy advice as part of a wider portfolio of wealth management services in banks and wealth management firms) will often recommend that their clients take part in these programmes. Longer donor education programmes will typically be organised as a series of residential seminars, lasting from a weekend to a week, over the course of a year or so. The donor education programmes that I have participated in have ranged in length from one day to a year, and most have taken place in person, although since the Covid-19

pandemic some have been held online. Residential seminars on these programmes are typically held in rural retreats, away from the bustle of participants' everyday city life. The Brazilian programmes I have participated in have been designed for younger philanthropists (usually in their thirties or forties), both inheritors and those who have accumulated wealth independently.

Donor education programmes are designed to help wealthy philanthropists better define their philanthropic aims and strategy, and to devise and carry out their philanthropic practice more effectively. They are facilitated by philanthropy advisors and usually cater to groups of around 15 to 20 participants. They might involve activities such as identifying a personal 'theory of change' for philanthropic intervention, and designing strategies for choosing grantees, creating philanthropic programmes and/or investing in market-based development models. Programmes often introduce participants to the work of civil society actors, public policymakers, and other philanthropists, often focused on a particular country or theme (tackling youth involvement in Brazil's drug trade, for example, or how philanthropy can help climate change mitigation and adaptation across Latin America). This work might include visits from or to NGOs or other actors, and many donor education programmes incorporate local or international 'learning journeys' (which may involve spending up to a week abroad), to explore social and economic development issues in a specific country and introduce philanthropists to potential grantee organisations. Finally, programmes often include sessions on managing the dynamics of family philanthropy and – occasionally – discussions about participants' personal relationship to wealth, inequality and money (for a more detailed discussion see Sklair, 2022: 128-135). Negotiating access to donor education programmes as an elite researcher (and managing encounters within them) has helped me to reflect on a number of issues surrounding research among elites, broadly captured in the following four questions.

Question One: A researcher's ability to access elite spaces is often dependent on their own circumstances and history. Should researchers more easily able to access elite spaces take advantage of this? What responsibilities do they take into these spaces?

My ethnographic work among elite philanthropists in Brazil has been dependent upon gaining access to the elite spaces of donor education programmes, and my ability to do this has been entirely dependent on my own privileged positioning, including my family history and class position. When participants arrive at a donor education programme they are usually invited to sit in a circle and introduce themselves. In these introductory sessions, I explain that I engage with philanthropy wearing 'three hats', which I put on at different (and sometimes overlapping) moments. Wearing the first of these hats, I assume the identity of a philanthropist myself. My mother comes from a wealthy (British expatriate) Hong Kong shipping family, and my grandmother was a well-known philanthropist who devoted much time and money to a diversity of local causes, including children's right to play and to adequate spaces for play, recognition for the rights of local sex workers and improving the lives of Vietnamese refugees seeking asylum through Hong Kong. My mother has continued this philanthropic tradition in the UK, but put her own (personal and political) mark on this work by becoming - to borrow the term adopted by some of the elite participants in Sherman's (2021) research - a 'class traitor', and channelling much of her inheritance to support those working for radical social and ecological justice in the UK and beyond. She has also been engaging my sisters and I in channelling much of her inheritance to support those working for radical social and ecological justice in the UK and beyond. She has also been engaging my sisters and I in her philanthropic practice for around two decades. While I don't share the lifestyles or bank accounts of most of my philanthropic research participants, I do, as such, occupy an extremely privileged class position and am a practicing philanthropist myself. My second

philanthropy hat' stems from a brief period working part time in a London-based philanthropy advising organisation while studying for my PhD. My work researching and writing reports on global philanthropists and their practice, and helping to organise a learning journey to Brazil, gave me the chance to explore the philanthropy advising profession from the inside. Finally – of course – I wear the hat of an academic philanthropy researcher.

To me, the last of my 'hats' feels like the biggest and most important one (as well as the real reason why I want to participate in donor education programmes in the first place), but I am aware that this is not necessarily the biggest 'hat' that other programme participants see, and certainly not the one that has legitimised my presence there. I am keenly aware that, without my first 'hat' (my identity as a practising philanthropist), access to donor education programmes would be impossible. I have thus made a decision to take advantage of this identity (and its related privileges), to do research in spaces that most people do not have access to. Talking about this aspect of my work with academic colleagues feels rather risky. When I began to do so, my PhD supervisor advised me to remove a lengthy reflection on my positionality in the field from the introduction to my thesis, suggesting this could make me unnecessarily vulnerable to criticism from colleagues. I followed his advice, and have generally done so ever since. I am also increasingly aware, however, that by not talking about my positionality in the field I am contributing to the silence that exists around the positionality of researchers in elite research and the selective mechanisms that dictate which researchers can and cannot pursue it in particular ways.

While my different 'philanthropy hats' have undeniably made my research possible, they have also brought certain challenges to the undertaking of research among elite philanthropists. This brings me to my second question.

Question Two: How do critical ethnographers of elites present themselves and their work in elite spaces? What ethical and methodological challenges are bound up in these processes?

My work in Brazil has been guided by a 'critical ethnographic' approach. This approach is committed to engaging with elites and their philanthropic practice simultaneously from a critical political-economic perspective and an intimate ethnographic one, attuned to elite experiences and perspectives (for further discussion, see Gilbert and Sklair, 2018). Combining both elements of this approach during participant observation on donor education programmes has posed methodological, ethical and political challenges. The muddy ethical waters of research among powerful elites have begun to attract growing attention over recent years. I am fully in agreement with Alvesalo-Kuusi and Whyte's (2018) call for a reconstruction of research ethics frameworks to incorporate a more collective definition of social science's ethical obligations to the 'public interest', one that can account for the ways in which the latter may be (and usually are) at odds with our currently prevailing ethical obligations to respect the individual interests of elites under study. At the same time, I am respectful of the very private and protected nature of the donor education programme as a fieldsite. I have entered these spaces cognisant of the unspoken rule that I can never write explicitly about much of what is said and takes place ithin them. Reflecting the arguments of Sleeboom-Faulkner and McMurray (2018), I have found formalised university ethics review processes entirely inappropriate to my research here; for example, I have never taken a consent form into a donor education programme as I am sure a request to do so would not only be rejected, but potentially jeopardise my access to them altogether.

Ethics aside, this also poses methodological problems for my research, not least because

donor education programmes are often the spaces in which I hear the most interesting things during my fieldwork. These rarely emerge during the formal activities of the programmes, but in whispered confidences and reflections shared during coffee breaks, or while sitting next to participants in cars, minibuses (and once a seaplane) during travel to and between programme sites. On several occasions, I have shared hotel rooms with fellow participants, talking late into the night about personal experiences of wealth, inequality, inheritance, and the dynamics of family philanthropy. I have used different techniques to get around the impossibility of writing directly about what I have learned in these encounters. Often, I have drawn on what I hear during donor education programmes to inform design of questions I ask philanthropists later on in structured interview settings (both with individuals I have met on programmes and elsewhere), to try to elicit similar reflections in a more formal (and ethically structured) research setting which will enable me to quote and discuss them directly. I have also used my findings from donor education programmes to inform my analysis of interview material, and of events and practices observed during other parts of my research. But this has often stripped research data gathered on donor education programmes of the immediacy and legitimacy it could have had, if I were able to give a more explicit ethnographic account of my experiences in these elite spaces.

Finally, donor education programmes demand a high level of personal participation. I have had to join in, and share personal experiences, ideas and reflection both during formal activities and in the informal spaces outlined above. Here, the boundaries between my 'hats' as mentioned above have often become very blurred. Through these experiences (and as is often for the case for ethnographic researchers across different kinds of fieldsites), I have also made real friends on donor education programmes, and I worry about upsetting or surprising them with what I go on to write (see more on this in Question Four).

Question Three: While carrying out research in elite spaces, I am acutely aware of my body language, clothes, hair and other factors that feel necessary for acceptance and trust building among my research participants. How do researchers of elites manage this? How does it shape our work?

Even bearing the privileged cultural capital that comes with my first 'philanthropy hat' (see above), I have spent hours (and money) deliberating over the correct pair of shoes, bag, hairstyle, etc. to take with me onto the donor education programme. While 'blending in' to a certain extent has felt imperative, it has also felt impossible to do so fully, leaving me wondering if signalling my difference – at least to some extent – might actually be a better tactic for acceptance. The difficulty of making this judgement is compounded by the fact that elite attire varies considerably in different settings. As mentioned above, residential seminars on donor education programmes often take part in countryside retreats which demand a more casual form of elite presentation. Fieldwork across these sites has thus meant reading different elite situations and spaces to know (or guess) what's appropriate when.

There is also a deeply gendered dimension to this aspect of navigating elite fieldsites, as women are subject to specific expectations around self-presentation and behaviour in these spaces (see Glucksberg, 2018). I have been very aware that my shoulder-length curly (read unruly) hair is out of place among elite Brazilian women, who generally wear their hair long, tidy and straight. I have rarely dared to wear my curls loose in this company, where it has always felt somehow safer to pin them up neatly, regardless of the situation. Likewise, I have usually resorted to a somewhat uncomfortable strategy of trying to 'blend in' through my choice of shoes and clothes, while constantly feeling that I can never manage to achieve this completely. Conversely, however, while my British accent and inevitable linguistic errors while speaking Portuguese have also marked me

out as 'different' in the field. However, I think this type of difference has actually favoured my acceptance among a Brazilian elite broadly enamoured with White Europeans and their cultural norms.

Question Four: How do researchers negotiate the maintenance of relationships with elite research participants after they have 'left the field'? What particular challenges are faced in returning to elite spaces to continue working in them, after we have left and written about them?

Returning to elite field sites and encountering research participants again always requires a readiness to engage around the outputs of research. Participants in the donor education programmes on which I have conducted research come and go, but I have met some repeatedly on several of these programmes. I have built important long-term research relationships (and in several cases, friendships) with some of these people, through which I have been able to observe the experiences of individual wealth elites over several years. Many of these relationships have transcended the boundaries of specific research projects, and have needed time and work to maintain. I have spent a lot of time worrying about how to balance the critical academic work that has come out of these relationships with their maintenance in personal terms. It has been particularly difficult to navigate when, how (and whether) to share my written work with these individuals. So far, I have found these interlocutors more willing and open to engaging with the critical aspects of my research than I had anticipated. One Brazilian research participant, on reading my account of his family's philanthropic practice (gathered through a series of interviews and visits, as well as conversations on a donor education programme) told me that he was "happy to see how you have taken into consideration the details of our conversations, how carefully you have treated the history of my family and how serious you have been in the scientific exercise through which you have reached your conclusions."

My interlocutor's response perhaps speaks to a level of self-reflection around wealth, power and inequality found among elite philanthropists, that may be rarer in those elites that dedicate less time to philanthropic practice. In fact, an unexpected development around my complicated positionality as philanthropist/critical philanthropy researcher has been that philanthropy advisors and intermediaries (the facilitators of donor education programmes) have begun to call on me to bring a critical voice to discussion in these spaces. Over the years in which I have been carrying out this research, I have been invited several times to participate in donor education activities with the explicit purpose of raising difficult or challenging questions and perspectives, that intermediaries feel have more weight coming directly from programme participants than from themselves. I have always taken up these invitations, and have become quite infamous for inciting political and critical discussion in these spaces. I often find this role nerve-wracking and exhausting, but certain intermediaries (and philanthropists) with whom I have built up close relationships always have my back at these times, even if they don't always agree with my opinions. In addition, in elite fieldwork settings where the possibility of creating real 'impact' through my critical research often seems slight, these moments of gentle disruption feel like a small but important way to challenge elite practice and its reproduction. Despite these interesting and broadly positive experiences, however, I am still aware that I – like other critical elite researchers – need to be continuously vigilant in managing long-term research relationships in these fieldsites.

The reflections above are particular, of course, to my own experience in the field, and they point to unresolved tensions and deliberations that continue to mark that experience as I develop my research trajectory among philanthropic elites. They are offered, however, as a contribution to the growing discussion around how researchers negotiate access and encounter across different elite fieldsites, in the hope that we can continue to explore these issues in collaboration with one another as we develop our work in this emerging field.

References at the end of the text

Unpacking Identities: Wealth Elites in a Luxury Hotel

Ujithra Ponniah and Comfort Molefinyana

In this paper, we reflect on our field experiences, to show how power and positionality, emerging from one's race and gender identities constitutes the researcher's field, and the way elite Black men navigate wealth accumulation strategies in contemporary South Africa. Within elite studies, reflections on the researcher's identity often find an articulation in terms of access. If the elite scholar is a person of colour, their identity becomes pronounced through the difficulties they encounter while accessing the field, similarly if the elite scholar's identity is dominant in the field, it is articulated in a language of class privilege, and difficulty negotiating trust because of the proximity to one's subjects (Lillie & Ayling, 2021). When it comes to the interlocutor's identity, elite studies show how white men assert economic and masculine domination to secure their spot on top of the wealth pyramid (Mears, 2020; Tobias Neely, 2022). However, in the post-apartheid South African context, the role of race and gender identities is invisibilized for those on top of thewealth pyramid, through a language of class cohesion.

"...our racial and gender identities determined how we were approached, what information was shared with us, what roles we were expected to play, and how we strategized to increase the degree of access we had in the field."

South Africa experienced liberation and liberalisation simultaneously in the early 1990s. With democracy, the African National Congress (ANC) led South African state had the onerous task of honouring the promises of liberation, while embracing neoliberal policies. The Broad Based Black Economic Empowerment (BBBEE) legislative framework was a step in the direction of weakening the white stronghold of South Africa's apartheid corporate ownership. However, BBBEE also led to the formation of a class of politically connected Black directors that sit on company boards and act as intermediaries between state and business. The conspicuous nature of their economic mobility and the widening inequality between them and other South Africans, has led scholars to focus on intra-racial inequality instead of inter-racial inequality (Crankshaw, 2022; Francis et al., 2020; Reddy, 2022). Moolman (2013: 97) argues that "the polarization and hierarchization of racial identities is no longer the blueprint for racial interaction in the postcolonial and contemporary South African post-apartheid era". The class cohesion between politically connected Black elites and their white counterparts, has been read as a successful case of overcoming racial and cultural barriers. However, the inter-racial class cohesion invisibilizes the racialized process of wealth-making, and the persistent racial division of labour between elites, which has led to skewed concentration of ownership in South Africa's financialised economy. In this paper, racialised processes of wealth making are unpacked by focusing on the lived experiences of Black elite men. Methodologically, the paper contributes to elite studies, by showing how the researchers' racial and gender identity determines their access to the field and the data collected.

The South African context for racialised elite formation has been shaped by the appropriation of public resources as revealed through a series of state-led inquiries into state capture and corruption, the latest of these being the Zondo Commission [1] (Ashman, 2019). Elite studies show how the site for network formation that helps in trading favours, services, information, and bribes, spills over to leisure activities and informal spaces of socialisation (Cerón-Anaya, 2019; Cousin & Chauvin, 2014; Osburg, 2013). A luxury hotel frequented by business and political elites in a gated city in Johannesburg was selected both as a site for research and a way to find elite interlocutors for our project – namely, wealthy Black African men. Over a period of eight months, we visited the hotel once a week and conducted observations and interviews with staff and with the elites that frequent the hotel.

Field reflections

Paradise Lost[2] hotel is a luxury hotel located on the periphery of the most exclusive residential development in Waterfall city. Waterfall city is a new mixed-use addition of luxury gated estates, which extends the northern urban sprawl of Johannesburg. Properties in the gated estate range between ZAR 25 - 150 million ($1.5 – 8.5 million), and it is the choice of residence for South Africa's 0.1% and transnational elites. The hotel promises urban luxury in a country setting. The hotel is intended for residents to relax and for business and political elites to network. Keeping with the demographics of Waterfall city, which is predominantly Black and Indian families, the hotel is primarily frequented by wealthy Black people. In this chapter, we examine three themes that shaped our experience of access: first, inadvertently entering the sugar daddy economy; second, cold-calling as academics; and third, stumbling upon a fixer.

Caught off-guard in the Sugar Daddy Economy

The wooden interior of Paradise Lost leads to a semi covered porch and outside seating. Our usual preference was to sit outside under the green fever trees to the left of the wooden porch. Winter was starting and the giant fire on the raised podium next to us provided warmth. The usual elites – mostly men – who frequent Paradise Lost were the first to pick up on our presence. They approached us, unsolicited, asked about our reason for being there, shared stories about their life, and frequently flirted with us. Through these encounters we learnt of the sugar daddy economy that we initially (unknowingly) were perceived as embedding ourselves in. So far at Paradise Lost we had only registered men at work: brokering deals, and trading favours. After spending more time there, we started noticing women in their twenties sitting with elite men well into their fifties and sixties. As with other contexts, we suspect that the reproductive labour of wealth-making was being shouldered by wives at home (Glucksberg, 2016; Ponniah, 2019) and by younger women in sexually transactional relationships in places like Paradise Lost Hotel (Mears, 2020). Early on, we became aware that we had to find ways to differentiate ourselves from our younger counterparts. To position ourselves, we identify as young Black[3] and Indian women. One of us is a non-South African, and this outsider status helped gain the interlocutor's trust, because of the assumed unfamiliarity about the state of national politics and the role of Black elites in concentrating wealth and power.

[1] The Zondo Commission is a judicial commission of inquiry into allegations of state capture and corruption in the public sector.
[2] The name of the hotel and the interlocutors are pseudonyms. Certain markers in the interlocutors' lives that are required for making substantive points have been carefully retained in a manner avoids their identification.
[3] The BBB-EE Act, drawing on the Constitutional provisions of South Africa, defines black people as all previously disadvantaged groups of people – namely Africans, Coloured, and Indians.

The steady rhythm of work at Paradise Lost peaked around Wednesday, before steadily giving way to more social weekends. On one Thursday, we were approached by a man we came to call 'Bogart Man', because of his Bogart cap. He wore thick dark glasses, smoked a black pipe, and carried his tobacco in a small brown leather bag. He had been coming to Paradise Lost since it opened and fondly greeted the other men. He described himself as an entrepreneur. To be provocative, we asked him what he thought about the term 'tenderpreneur', a colloquial and offensive term referring to Black elites swindling the state to amass wealth. He responded by saying "I do not give a fuck about it. My thing is, chow the money but do your work". 'Chow' is a colloquial reference to eating food, in this case, it refers to corrupt practices. After a brief silence he started again, "what is a government in exile! What skills do they have? They came back from exile and were given an allowance of ZAR 99. What can one do with ZAR 99? Some of them had lost their mind?". Bogart man was questioning the government's competence to lead, and the failed attempts at integrating political exiles back into the society. Through the course of the interview, he told us that he had scammed a municipality of billions of Rands[1] by helping a listed company settle their water bill for half its amount. We struggled through the interview, conscious of his historical wounds from the apartheid era while boundary-making against sexually explicit jokes, advances, and his impulse to groom us with life advice in the sugar daddy economy at Paradise Lost. The interview came to an abrupt halt when he refused to respect our repeatedly drawn boundaries.

On another day, we were approached unsolicited by a drunk former medical consultant, who was facilitating a deal between South African political elites and global pharmaceutical companies. He told us he had been pioneering in his field and had trained at a prestigious college in London. However, under apartheid South Africa he was not allowed to practise his speciality. Instead, he was up all-night treating bullet wounds in a trauma unit for two years, where he feared contracting HIV from his patients. After sharing this heavy moment, he flirted and laughed with us. Upon learning that we were researching wealth, he passionately advocated for land expropriation without compensation – a contested land reform policy that the South African government has been exploring with little political will. When we questioned the working of the policy, he was ready for combat and spoke angrily about the trauma of losing one's cattle, land, and housing through the draconian colonial and apartheid era acts of 1913 and 1950. Subsequently, we became aware that someone close to him had been instrumental in drafting the government's land reform policy. He had lost that person recently. We felt his grief and our tone became milder. As with the 'Bogart Man', we wondered if we were expected to perform emotional labour because we were women of colour. Would these men be vulnerable about their historical trauma if our identities were different?

Cold-calling in-person

After multiple similarly uncomfortable incidents, we decided to exercise control over the situation. We printed business cards with our university affiliation and our professional credentials. By this time, some familiarity grew, the waiters and managers gave us a familiar nod, knew our coffee orders, and the regular customers at Paradise Lost stopped approaching us. With the relief of not being hit upon, came the familiar helplessness of finding an elite interlocutor. In theory, using business cards was a sound plan. Our academic credentials gave us legitimacy and security and we had a prop with which to approach the people we wanted to speak to. We planned on approaching prospective male interviewees, introducing ourselves, telling them about our research, exchanging business cards, and, ideally, setting up an interview at a mutually convenient time.

[1] 1 billion rand is equal to 44 million pounds.

Armed with our business cards, we went back to Paradise Lost. But how were we going to find an interlocutor of the elite status we were looking for? Paradise Lost was frequented by elites, but it was also open to the public. Would an elite man be busy in meetings or unwinding with a younger woman on his arm? Would they be dressed in conspicuous brands or in casual sandals? We did not know who we were going to speak to, and soon realised the difficulty of cold calling in-person, combined with going in blind. To limit our scope, we decided to use property ownership in Waterfall city's top two exclusive luxury gated estates as our criteria. There was always the possibility of people of not being forthcoming about where they owned property, but mostly, we found location linked property ownership to be a disarming question. The other thing we had to negotiate with this approach was the courage it took to walk up to men we did not know. In our initial attempts we were riddled with fears: what if people knew that we were critical of their accumulation strategies as fueling social inequality ? What if we made people angry by interrupting their networking? How does one present one's study in an honest yet non-provocative manner? We channelled some of our anxiety by focusing on how to dress in class-appropriate ways.

As months went by, we slowly learnt of the hidden nooks and crannies in the hotel, where elites conducted their affairs. Paradise Lost had ordered its space to suit the preferences for privacy and exclusivity among the elite inner circle. Tucked away from plain sight was the homeowner's lounge that could only be accessed by estate residents. We learnt that the room had a flight of stairs that connected to a meeting space upstairs. Once we saw two women in their twenties on the arms of a man well into his sixties, entering the room, followed by waiters carrying expensive champagne. The hotel housed and guarded the after-work secrets of elite men by creating discrete spaces. On another occasion, we saw a politician protected by her six bodyguards ascend the stairs next to the kitchen. We requested for a waiter to slip our business cards to her, but we were not successful[1]. Our business card approach was working at a painstakingly slow pace with the elites that frequented the ground floor of Paradise Lost. We knew there was an inner core of elites that were hidden out of reach, so we had to further fine tune our strategies to gain access.

Stumbling upon staff as 'fixers'

Incidentally, on a Friday evening, we were re-approached by the former medical consultant. In our first encounter he had promised to introduce us to the gated estate's residents, and particularly the CEO of a mining company. As he sat down, he smiled, and began to parrot the lines we had heard before. We laughed and reminded him about having met us before and his promise to make introductions. We asked him if we could have an email or a phone number of the CEO of the mining company. He said, "you do not interview men like him by writing an email. You have to come with me and slowly you can read the room and ask questions". It was 6pm, and it was hard to take his intentions seriously, so we decided to leave. The next morning, Paradise Lost called to say that the medical consultant had not covered his bill. If he did not pay, the money would be deducted from the waiter's salary. The bill was as big as the waiter's entire monthly salary. We were unsure if he would want his number passed on, at the same time, we could not let the waiter cover the bill. We told the manager at Paradise Lost – Pauline, that we would come in person to resolve the matter. Pauline is an attractive and intelligent woman who works part time at Paradise Lost. In the end, I gave Pauline the doctor's contact details. When we told Pauline that we are studying the racial experiences of wealth making, it resonated with her. She offered to introduce us to an extremely private elite who would easily be in the top 0.1%. Adapted from journalism as an alternative access strategy, elite scholars have called this person a 'fixer'

[1] Our access to elites has been limited to men, despite our repeated efforts to access women.

(Bakkalbasioglu, 2020). She called the elite man, requested him to speak to us and, to our surprise, he agreed. After persisting with Paradise Lost for eight months, we managed to get access to the inner circle of the elite core through our serendipitously found 'fixer'.

Conclusion

In this paper we show how our racial and gender identities determined how we were approached, what information was shared with us, what roles we were expected to play, and how we strategized to increase the degree of access we had in the field. Similarly, our elite interlocutors' race and gender identities determined the course of their lives, where and how they lived, what they studied, where they worked, whom they interacted with, the businesses they engaged in, and the strategies through which they accumulated wealth. Reflecting on our field experiences, we distil three stages and their related strategies, to gain access to elite interlocutors: first, we were caught off guard when elites approached us unsolicited assuming we were part of the sugar daddy economy. These encounters provided the template for further interviews, while alerting us to fine-tune our research methods; second, we printed business cards to forefront our academic identities. However, this approach meant cold-calling in-person. It required courage and restricted our access to elites on the ground floor. Third, we stumbled upon a member of staff at the hotel, who acted as a 'fixer' and helped us access the inner core of elites. Power and positionality governs the actions of our elite interlocutors who are at the helm of South Africa's racially skewed economy. It also determines how we acted in the field, and how we were acted upon.

References at the end of the text

When big donors give big: Geographies of super-philanthropy in higher education

Pablo Fuentenebro

1. Introduction

In October 2021, Bloomberg Philanthropies (2021) announced a USD 43 million investment towards the creation of a 'Bloomberg Center for Public Innovation' at Johns Hopkins University. Although a significant amount, the sum paled in comparison to Michael Bloomberg's USD 1.8 billion donation to that same institution in November 2018, the largest ever private contribution to a higher education institution in the United States up until that moment (Hartocollis 2018). Repeated cuts in public spending to education, health and culture have made these sectors increasingly reliant on the 'generosity' of foundations, corporations and private donors. Among the latter, a new generation of 'mega-donors' has gained growing notoriety not only for the extraordinary sums of money pledged to higher education but also for the recipient institutions targeted: From the Bloomberg example mentioned above, to John and Ann Doerr's USD 1.1 billion donation in 2021 to establish the School of Sustainability at Stanford; or Priscilla Chan and Mark Zuckerberg's USD 500 million donation to Harvard that same year, such gifts have become representative of a 'super-philanthropy' put in place by High Net Worth Individuals (HNWI) and foundations alike (Hay and Muller 2014).

Although the culture of giving to higher education is not particularly new, it is somewhat paradoxical that, in times of economic austerity, some of the education institutions that have benefitted the most in the United States happen to be the wealthiest in the country, as a look to The Chronicle of Philanthropy (2023) 'Major Private Gifts to Higher Education' can certify. This fact challenges one of the core premises of philanthropy, namely that it is something done for the public good and that it should contribute towards the redistribution of wealth (Harvey et al. 2022; Reich 2005).

While scholars have been examining the geographies of the super-rich for the past couple of decades (Beaverstock et al. 2004; Hay and Muller 2012; Pow 2011), the geographies of super-philanthropy have only come under growing scrutiny in recent years (Hay and Muller 2014; Fuentenebro and Acuto 2022). In this contribution, I examine the rise of big donors and 'mega-gifts', and the implications that the concentration of wealth (and donations) are having among higher education institutions (HEI). I argue that such concentration is playing a central role in the geographies of giving to higher education, and that further examination about the placing of gifts and donations to academic institutions is urgently needed.

It is important to note that, although this paper draws largely on examples from the United States due to the availability of data and the size of donations, it is a trend that expands across different continents and philanthropic traditions, and which speaks also to recent fundraising efforts and campaigns put in place by academic institutions from Europe to Asia and Oceania (e.g. Harvey et al. 2022; Sidel 2016; Warren, Hoyler and Bell 2014). In the next section (Section 2), I provide a concise literature review of the geographies of 'super-philanthropy'. Section 3 focuses on the rise of big-donors and mega-gifts as well as the consolidation of different philanthropic structures. In Section 4

I turn my attention to the geographies of giving to HEI, and the potential implications of 'super-philanthropy' within the context of higher education. Finally in Section 5), I conclude the paper with some reflections about our role as scholars working within an academic setting.

2. Geographies of super-philanthropy

In a seminal paper, Beaverstock et al. (2004) made a call to critically engage with the geographies of the 'super-rich' and not let them "get away with it". As the authors argued, "the fact that geographers have rarely (if ever) questioned the immense claim that the super-rich make on the landscape of contemporary cities is remarkable in an era when the wealth gap is becoming wider and wider" (Beaverstock et al. 2004, 405). Ever since, an emerging body of literature has examined in more detail this group of individuals, both within the social sciences in general (Khan 2012; Serafini and Smith Maguire 2019) and within geography and urban studies in particular (Butler and Lees 2006; Hay and Muller 2012; Pow 2011). Parallel to this, scholars have been paying increasing attention to the geographies of 'super-philanthropy', and the attachment that HNWI have to specific places, something which translates into their patterns of giving (Glückler and Ries 2012; Hay and Muller 2014). Recent examples include Bassens' et al. (2019) study of 'urban elites' and cultural patronage in Brussels, as well as Montero's (2020) analysis of the role of international organisations and philanthropic institutions influencing urban development agendas in Bogotá. The latter is a particularly relevant point for our field: as Michele Acuto and I have discussed elsewhere (Fuentenebro and Acuto 2022), much of the urban dimension of today's philanthropic giving is not just about the impact that HNWI and philanthropic institutions have in cities but also about the role these actors play in shaping urban governance and policy-making agendas. Examples of this include Rockefeller Foundation's 100 Resilient Cities (100RC) Programme, which targeted 100 cities worldwide for a period of six years (2013-2019), or the recent Bloomberg Philanthropies' Covid-19 Global Response Initiative, aimed at supporting cities from both the US and low and middle-income countries during the Covid-19 pandemic.

At the same time, the consolidation of different philanthropic structures such as Donor Advised Funds (DAFs), foundations and Limited Liability Companies (LLCs) have not only granted HNWI and corporations bigger control over their philanthropic investments but also allowed elites to have a bigger say on policy making matters, something Rogers (2011) has referred to as 'philanthro-policymaking' (see also Cassidy 2015). For example, in their discussion about 'millennial philanthropy', Mitchell and Sparke (2016, 736-737) have examined the role that philanthropic foundations have played in the 'educational reform' in the United States, where the so-deemed 'failure' of public schools in many school districts has led to the emergence of charters schools, "publicly funded but privately run" institutions. As the authors point out, charter schools have been championed by the Gates Foundation and others as a market-based 'solution' to the problems of public education, and received the blessings of local authorities and even hedge fund managers (Mitchell and Sparke 2016, 737 & 739). However, as the scholars suggest, despite the large body of evidence pointing towards the different structural problems that have contributed to the 'failure' of the public education system in the first place, 'education reformers' have favoured a narrative of "individual freedom and choice" when making their case for charter schools, targeting in particular families in need (Mitchel and Sparke 2016, 736 & 740).

3. The evolving philanthropic landscape: big donors and mega-gifts

The unprecedented accumulation and concentration of wealth by HNWI over the past couple of decades has led to a so-called Golden Age of philanthropy (Hay and Muller 2014). The two characteristics that are usually referred to in discussions about present-day philanthropy are the vast sums of money spent on philanthropic endeavours as well

as the 'impact seeking' approach promoted by 'philanthrocapitalism', a term first coined by The Economist (2006) (see also Bishop and Green 2010). A number of scholars, however, have argued that there is nothing particularly new about this, as this entrepreneurial approach to philanthropy was already at the core of the philanthropic practices enacted by the likes of Carnegie or Rockefeller; what is new are the very explicit means by which personal interests and agendas have been put on the table by those giving (see, for example, McGoey 2012; Mitchell and Sparke 2016).

In turn, two of the elements that have come to characterise today's super-philanthropy include both the growth of big donors and the size of their gifts. As a number of recent reports have pointed out, in the case of the United States the number of 'big donors' and the size of 'mega-gifts' has grown at an unprecedented rate: while the number of big donors has more than tripled since the early 1990s, the threshold for what is considered a mega-gift jumped from USD 30 million in 2011 to USD 450 million by 2021 [1] (Collins and Flannery 2022, 5; Rooney 2019). At the same time, the number of households making charitable contributions has declined over the past couple of decades: while in 2000 the percentage of households giving to charity reached 66.2%, by 2018 this figure had dropped to 49.6% (Indiana University Lilly Family School of Philanthropy 2021, 5).

When it comes to higher education, big donors and large gifts have also gained an ever-bigger presence, as noticed by The Chronicle of Philanthropy (2023) 'Major Private Gifts to Higher Education', which has been reporting on these gifts since 1967. Although The Chronicle's list features mostly universities and colleges within the United States, in more recent years the list has also included donations to institutions in India, Singapore or the United Kingdom, which speaks to the international dimension of giving to higher education. In the case of US-based HEI, it is perhaps no coincidence that those institutions frequently featured in The Chronicle include HEI such as Columbia, Harvard, Johns Hopkins or Stanford University, to name a few. These schools have been able to position themselves as major recipients of gifts and donations thanks to an extensive network of wealthy alumni, donors and benefactors (Harvey et al. 2022). As the examples from The Chronicle remind us, giving to education is a place-based phenomenon driven -in many cases- by personal connections and affinities to specific places: whether this may be the town a donor grew up in, the school attended or the place they currently live in. It is perhaps then no coincidence that Michael Bloomberg decided to place his philanthropic focus on Johns Hopkins University, or Priscilla Chan and Mark Zuckerberg on Harvard University. Although there is nothing wrong, in principle, with making a multimillion (or multibillion) donation to your alma mater, it is also necessary to understand the consequences that may result from this kind of super-philanthropy giving for the broader higher education landscape, something I will be turning my attention to in the following section.

The decision by HNWI to invest in specific places and institutions does not only represent an exercise to showcase their wealth or generosity but a much more complex issue directly related to governance and taxation regimes. The way tax systems are set up in the United States, and many other countries, means that those on the top are able to benefit substantially, or even exclusively, from giving, thanks to the myriad of tax breaks and exemptions available to them, making philanthropy a form of subsidised spending for the very wealthy (Collins and Flannery 2022; Hay and Muller 2014). The case of DAFs in the United States is a case in point: in the year 2021 alone, contributions to DAFs reached an all-time high of USD 72.67 billion (National Philanthropic Trust 2022). DAFs are set up

[1] 'Big donors' are defined as those individuals with "an adjusted gross income of $1 million or more" (Rooney 2019). A 'mega-gift' is defined as "one that is large enough to require a manual adjustment to their estimate models" (Collins and Flannery 2022, 5). The threshold for what constitutes a 'mega-gift' is reviewed on a regular basis in the Giving USA annual reports on philanthropy (see Indiana University Lilly Family School of Philanthropy 2022).

in such a way that donors, who may decide to remain anonymous, can immediately obtain a tax deduction once the funds reach the DAF while having no obligation to disburse them to a specific charity or organisation within the near future (Olen 2017). While praised by donors for their flexibility and lax reporting criteria, both DAFs and LLCs (another popular philanthropic instrument) have equally raised many concerns about the degree of accountability and public scrutiny they can be subject to (Cassidy 2015; Piper 2019).

4. The business of giving to higher education

Giving to higher education is not a new story. It is the founding story for many universities in the United States and elsewhere, which were established thanks to the 'generosity' of wealthy benefactors and donors. In the 2021-2022 fiscal year, charitable giving to colleges and universities reached a record USD 59.50 billion. Out of those, USD 15.72 billion were raised by 20 institutions alone (9 public and 11 private); that is, 27.6% of the total[1] (Kaplan 2023, 9).

The fact that such a small number of institutions have been able to attract such concentrations of giving is something that speaks to how super-philanthropy and wealth among elites reproduces the power and privilege of certain institutions. As Harvey et al. (2022, 2) have recently argued in their study of 'elite philanthropy' among 'global elite universities', it is precisely the existence of such philanthropic resources which have enabled these institutions to have a "dominant position" within the higher education landscape. As the authors (2022, 1) further suggest, philanthropy has become a "critical differentiator because it enables elite universities to sustain privileges that attract highly qualified students, faculty and powerful supporters", allowing them in exchange to "boost their competitive positions through acquisition of valuable cultural, social and symbolic resources". This is something that was already acknowledged by Odendahl (1990) in the early 1990s, who suggested that philanthropy was no more than the means for elites to perpetuate their own interests. This is a debate that we have seen re-emerge in recent years with the case of the preferential treatment given to 'legacy' applicants by higher education institutions, whereby donations made by parents (or applicants themselves) may help prospective students secure a spot on the dean's interest list (Yakowicz and Coudriet 2019).

In the case of big donors and mega-gifts, the implications of giving to already privileged institutions goes beyond the influence that a donor may be able to exert in a specific HEI to questions of who really gets to benefit from such display of super-philanthropy. For example, Michael Bloomberg's USD 1.8 billion donation to Johns Hopkins in 2018, while praised for its potential to benefit students in need, raised many questions about the increasing funding disadvantages and difficult financial position that many small publicly funded institutions and community colleges find themselves in[2] (Harris 2018). Equally, John A. Paulson's USD 400 million donation to Harvard's School of Engineering in June 2015 (thereafter renamed after him) caused great controversy, not only from those who questioned the ethics behind his wealth but also for the consequences of making such a gift to the wealthiest institution in the country[3] (Lewin 2015). I am not suggesting here that all HNWI are exclusively donating to the wealthiest institutions but rather how

[1] These figures are compiled on an annual basis by the Council for Advancement and Support of Education (CASE) Voluntary Support of Education (VSE) survey, and include donations from alumni and other individuals, foundations, corporations, Donor-Advised Funds (DAFs), and other types of organisations (Kaplan 2023). The names of the actual recipient institutions are not included in the VSE survey Key Findings.
[2] In 2020, The New York Times estimated that Michael Bloomberg had donated a total of $3.3 billion to Johns Hopkins University up until that date (Burns and Kulish 2020).
[3] John A. Paulson, a hedge fund manager and billionaire -and a Harvard alumnus- is notoriously famous in financial circles for making his fortune by betting $15 billion against the housing bubble (Lewin 2015).
[4] Thanks to Michele Acuto for this suggestion.

extremely large gifts, such as the ones recorded by The Chronicle of Philanthropy (2023) have predominantly targeted such institutions (Harris 2018). On the other hand, there are cases of big donors who have also pledged significant amounts to different HEI. For example, in 2020 Mackenzie Scott made a series of donations totalling over USD 800 million to HBCUs (Historically Black Colleges and Universities) as well as other institutions with a Latino and Native American student population. In this case, however, the donation was not to a single institution but to 42 different universities and colleges (Anderson and Lumpkin 2020).

While the role of university campuses as drivers for urban development is one that has been critically examined by geographers in recent years (Addie 2017; Addie et al. 2015) it is also necessary that we look into how the 'placing' of gifts into HEI may help consolidate these institutions as centres of expertise or hubs for innovation within wider urban development plans[1]. For example, in November 2022, New York University announced that it would invest USD 1 billion in the Tandon School of Engineering (NYU 2022). The School, renamed after a USD 100 million donation from Chandrika and Ranjan Tandon in 2015 is part of the NYU Center for Urban Science and Progress (CUSP) in Brooklyn, and one of the new campuses resulting from the multi-billion 'Applied Sciences NYC' competition and redevelopment project launched in 2011 by New York City major at the time, Michael Bloomberg (Addie et al. 2015; NYU 2015).

As part of this geographic analysis, we need to ask ourselves how the placing of these gifts in certain institutions may impact those less privileged, and what this represents for the redistribution of wealth among HEI. For example, in the case of NYU's engineering school, as The New York Times reported at the time, despite the existence of financial aid available to lower-income students, its tuition fees remain out of reach for many, and are significantly higher compared to other engineering schools in New York State (Freytas-Tamura 2022). This makes us wonder whether the student population from Brooklyn and neighbouring boroughs will actually benefit from the presence of such institutions in the neighbourhood.

5. Final remarks

In this paper I have made a call to pay closer attention to both the increasing importance of super-philanthropy for higher education as well as the geographic dimension behind much of today's philanthropic giving. The uneven distribution of philanthropy has become increasingly problematic when we take into consideration both the growth of big donors and the rise of 'mega-giving', and how this translates into patterns of giving to higher education. Although geographers and urban scholars have critically examined the geographies of super-philanthropy in recent years, there is still much work that needs to be done on the geographic dimension of super-philanthropy and the implications of 'mega-gifts' within the context of HEI. For example, we may want to consider how the placing of gifts in universities relates to broader discussions about the role of academic campuses as drivers of urban development and innovation as well as centres of expertise, and the wider effects that giving to HEI can have within cities and across regions.

As scholars working in this sector the issue of private giving to education is one that directly affects our work, and leads to a series of questions about how this sort of funding may impact our research. As our HEI (and us) have become more and more reliant on a wide range of external sources of funding, we need to ensure that our institutions maintain their academic independence and rigour.

References at the end of the text

Identifying and Analysing Elite Populations

Tom Mills

One point of discussion and disagreement at the NCRM Innovation forum on 'Studying elites' was the uniqueness of various methodological issues in elite studies compared to the study of non-elite groups. Don't researchers examining other populations often face similar challenges around access? Don't they too navigate ethical dilemmas around gaining trust before assuming the critical distance necessary for academic work? Perhaps the differences are sometimes exaggerated, but the inversion of the usual power relationship between the researcher and the researched (axiomatic to 'studying up') certainly brings with it distinct methodological, as well as ethical, challenges.

"...without an understanding of organisations we can only obtain a very partial picture of the lifeworlds of elites."

In this brief contribution, though, I would like to touch on two other aspects of elite studies which are less discussed in recent literature, and which are at once both theoretical and methodological. The first is the question of how elites should be defined, and therefore identified in empirical work, a question that obviously has implications for our ability to make comparisons between studies. The second is the relative lack of attention given in elite studies to organisations. This is a common oversight, at least when it comes to the sorts of methods I discuss here, but without an understanding of organisations we can only obtain a very partial picture of the lifeworlds of elites.

Identifying elite populations

The first question, concerning consistency in identifying study populations, is a significant challenge given the unusually vague central concept. Age, gender, ethnicity, and many other social categories, are in reality of course more complex than the variables that appear in statistical models, but the elite concept is far more ambiguous. There is not, and has never been, any scholarly consensus as to how an elite should be defined. John Scott, probably the leading theorist of elites, has written that it is 'one of the most general – and, therefore, one of the most meaningless – terms used in descriptive studies' (Scott, 2008: 27). In part this is because it is now more of a political concept than a scientific one. This is not completely unique. The concept of class, for example, is arguably similar. But in that case the categories used are more often the topic of scholarly debate – and such debate more often concerns how a population should be disaggregated, rather than how it should be identified in the first place. In the case of elite studies, we are even more than usual stuck with the selection criteria used by the original researchers, and even less able to assess the efficacy of definitions.

In recent years, working definitions have been very broad, encompassing members of the higher professional and managerial occupations; the dominant players in any social sectors; or just especially affluent individuals (or households). Scholars have mostly not troubled themselves about this, with all and any research into the agents of inequality being welcomed. This is in contrast with some lively and protracted theoretical debates in the previous wave of elite studies. Taking stock of these, Scott has argued that the elite concept remains useful provided it is rooted in a rigorous conception of social power. For Scott, the term is 'most meaningfully and usefully applied to those who occupy the most powerful positions in structures of domination' (Scott, 2008: 33; see also Scott, 2003). This definition has the advantage of being analytically distinguishable from class, and lends itself to the positional method for identifying an elite (with the other major approaches being reputational and decisional, see Hoffmann-Lange, 2007; Hoffmann-Lange, 2018).

The positional method is also favoured by Bukodi and Goldthorpe (2021), who in a recent article setting out a new approach to elite studies suggest that it avoids researchers having to make more arbitrary decisions, or having to defer to others in assessing reputations. (Bukodi and Goldthorpe, 2021: 677) For Bukodi and Goldthorpe, elites should be understood as 'small-N entities, clearly distinct from social classes'. This much seems sound to me, and is consistent with Scott's theorisation. Where they differ markedly, however, is in attempting to decouple the elite concept from that of social power. Directing their critique at Scott specifically, but also at Mike Savage (exemplars in British sociology of the classic focus on social power, and the more recent shift towards inequality and capital respectively) they advocate defining elites as 'leading groups in any area of social life' (Bukodi and Goldthorpe, 2021: 676). While this doesn't jettison the concept of power altogether, it does repudiate the assumption that the researcher should seek to identify an equivalent of C. Wright Mills's (2000) power elite, as is the task of power structure research (Barrow, 1993: 13-50; Domhoff, 1980; Domhoff, 2017; Denord et al., 2020). This position arguably brings Bukodi and Goldthorpe closer to a Bourdieusian approach, which by contrast puts the question of domination at its core, but is similarly concerned with the analysis of distinct areas of social life.

Descriptive methods

With an appropriate field or sphere identified, what methods should researchers use to identify and analyse its elites? Here I agree with Bukodi and Goldthorpe that prosopography (i.e. biographical data on a given elite population) is crucial (for discussions see Rossier, 2019; Lunding et al., 2020). We might obtain such data through direct access (e.g. surveys), but as is widely discussed in the literature, this may not be possible. Elites, however, are not like other hard to reach groups. Precisely because they are notable/powerful, they are more likely to feature in secondary documents and legal and administrative records. Such sources readily yield the kind of basic data required for prosopography. This can be collated manually for smaller populations, and in some cases it may be practical to do this at scale using computational methods. With the elite population identified, network analysis, Multiple Correspondence Analysis (MCA), or other forms of Geometric Data Analysis (Le Roux and Rouanet, 2004), can be used to analyse the relational structure of our elite. This allows us to treat it not only as a population with distinct characteristics (compared with the general population or other elites), but to analyse it as a social group with its own internal dynamics, hierarchies and emergent properties.

Flesh on the bones

The sort of thin description yielded by prosopography, MCA and network analysis can be augmented with qualitative data to put flesh on the bones. Here conventional methods are appropriate. In terms of access, it is worth noting that while elites are often secretive, they also surround themselves with potential informants who may anyway be more

addition, detailed textual sources may be available that might be amenable to social scientific analysis, either manually or digitally at scale (Adamson and Johansson, 2021; Little and Winch, 2021; Grimmer et al., 2022). In addition to prosopographical data, as Bukodi and Goldthorpe note in passing, we should also be concerned with elite attitudes and behaviour – how they 'actually use their power, in concert or in conflict.' This is a distinct question, and for political elites in particular there are a range of well-established methods to draw upon, but in general the methodological strategies are not so different to those already discussed. Significant forms of social action will likely leave some record, as will ideas since they are really only of any social importance if mobilised. Again, informants with proximity to elites may prove valuable, and relevant documents may be available.

Back to the Power Elite

On the face of it, the putative new approach set out by Bukodi and Goldthorpe, with its focus on the leading figures in particular spheres, seems like a perfectly coherent position that neatly sidesteps some theoretical complexity. But as a research agenda it would always leave unanswered an obvious question, namely: does the subculture or field in which a given elite dominates have any broader significance? Arbitrarily foreclosing this question makes little sense if we assume (as I do) that academic and scientific research should aims for some public relevance. The world champions of Donkey Kong achieve recognition, status and material rewards, but an 'elite' of a marginal subculture or field are still marginal. In my view, as researchers we should not only ask: (1) who are the leading groups in a particular area of social life?, but also the prior question: (2) which are the leading areas of social life? This then becomes a question of who wields power in society more broadly. This is the research question Bukodi and Goldthorpe seem to want to evade, but in my view is the very question that researchers in elite studies should set out to answer, at least collectively.

Some of the methods discussed above potentially offer a route back to the classic question of the power elite; provided discreet studies of different sectors can be combined. Obviously, this depends on something close to a shared definition of elites, and this would require researchers to engage in much more theoretical debate. In principle, however, the definition offered by Bukodi and Goldthorpe, or something like it, could be scaled up, either rather loosely by drawing on the insights of different studies, or more rigorously and systematically with studies that examine relations between elites from different spheres. Khan (2012: 362) suggests that a key aspect to consider in studies of elites is whether the particular resources over which they have 'vastly disproportionate control' (or alternatively the forms of capital they possess) are transferrable or convertible; and from a Bourdieusian perspective the concept of the 'field of power' allows for a synthesis of field analyses (Bourdieu, 2020; Maclean et al., 2017; Denord et al., 2018; Denord et al., 2011) Social network analysis offers another methodological pathway to identifying an 'elite of the elite', and this approach has seen some significant advances in recent years, with k-core decomposition being proposed as a way to avoid arbitrary decisions by researchers as to the size and composition of a power elite (Larsen and Ellersgaard, 2017; Larsen and Ellersgaard, 2018; Rossier et al., 2022).

The importance of organisations

One important aspect that risks being overlooked in the approach I have sketched out above is the role played by organisations. If we are interested in power, we must surely be interested in organisations, since it is in and through them that elite power is exercised. One of the reasons I like the rather parochial and antiquated term, 'The Establishment' (Jones, 2015; Davis, 2018; Baltzell, 1987), is it suggests both a network of individuals and a set of institutions. In elite studies, schools and universities have received significant attention as sites of elite socialisation (e.g. Lillie, 2020; Khan, 2011) and recruitment (e.g.

Reeves et al., 2017; Worth et al., 2022), but other types of organisations – organisations more involved in the direct exercise of power – have been relatively neglected by comparison, at least by those most identifying with elite studies.
Organisations do of course feature in prosopographical analysis, but too often disappear. In social network analysis, for example, they might be represented as edges within interpersonal affiliation networks, or in field analysis might be similarly abstracted to individual level variables that are believed to characterise the capital of a field. In principle, organisations can be more directly integrated using such methods. In social network analysis, for example, the duality of individuals and organisations (Breiger, 1974) can be represented as an interorganizational as well as an interpersonal network, or indeed as a bipartite network encompassing both (Everett and Borgatti, 2013). Effectively integrating organisations into elite studies, though, calls for a further set of theories and qualitative methods, e.g. from history, organisational studies and state theory. Many of the methodological challenges here are similar to those already discussed. The access required for ethnographic work may prove difficult. But powerful organisations such as states and corporations generally keep good records, and historical and/or investigative research may uncover documents, including what Massoumi and Morgan (2022) refer to as the 'hidden transcripts of the powerful'. Integrating organisations in this way envisages a breadth and depth that would be extremely difficult for an individual researcher to deliver on in a single empirical study. But this merely underscores the importance of working collectively, and of engaging in theoretical debate that can potentially yield the conceptual clarity necessary to do so effectively.

References at the end of the text

'There is no alternative'? The role of the media in shaping public understanding about the economy

Sophie Knowles

In the context of the 'cost of living crisis', building a more inclusive economy in the UK is more important than ever. The news media plays an important agenda-setting role in any effort to reshape the economy, especially during crises, by deciding which experts will frame debates, and shaping views on economic policies (Knowles 2020a; Schifferes and Knowles 2022). However, low economic literacy is a significant barrier to a better informed and engaged public in the UK, as elsewhere. This chapter responds to a central paradox: as the global economic system is becoming more complex, the public is consuming more mainstream news, but, at the same time, journalism is increasingly under-resourced and the public trusts journalists less (Schifferes and Knowles 2022). This paper evaluates a range of (academic and industry-based) surveys of the public and journalists to evaluate how their views overlap and what strategies might improve the engagement and quality of economic news.

Growing audience engagement with mainstream media in a context of low economic literacy and low trust in news

Survey data tells us that the public in the UK and internationally are consuming more mainstream news about the economy, especially during times of economic crisis (Schifferes and Knowles 2022; Newman et al. 2021). Moreover, while there is increasing use of digital technology, and a range of alternative news sites, there is still a reliance on TV as a news medium and a tendency to go to well-known brands such as the BBC during crises (Schifferes and Knowles 2022; Newman et al. 2021). The type of news media and the frequency with which it is consumed can vary significantly by income and gender. Low-income earners, for instance, use mainstream news media for their financial and economic information in the US (Rhine and Toussaint 2002), and the same is true of South Africa. This is compared to wealthier demographics who turn to specialist financial advisors and specialist financial news (Roberts, Struwig, Gordon, Viljoen and Wentzel 2012). In terms of gender, two surveys representative of the UK population indicate that women turn more to friends and colleagues and social media for personal financial advice than men, while more men consume more news from specialist financial newspapers than women (Schifferes and Knowles 2020, 2022). Aside from the consumption of media, financial and economic literacy is also differentiated by age, gender and income.

Numerous surveys indicate the wider public still struggle to understand even basic financial and economic terms and concepts (Berry 2019; Norrish 2017; OECD 2017). There are wide gaps in levels of knowledge between those who are better informed by specialist publications like the Financial Times and those who rely on mainstream news. Young people and women consistently have lower financial literacy than older and wealthier males, for reasons that are yet to be explored fully (Lusardi and Mitchell 2010), while levels of financial knowledge are usually correlated positively with education and

income (Economy 2017). Survey data therefore shows the young and disadvantaged (women in particular) have the lowest understanding about basic economic concepts, and the lowest financial literacy scores, and they are the least likely to seek out (or be able to afford) specialist and reliable financial information (Atkinson and Messy 2012; Knowles and Schifferes 2020; Lusardi and Mitchell 2010).

Research has shown that journalists want to see the audience for economic journalism broadened, and they are concerned about the public's low levels of financial and economic literacy (Knowles 2018; Peston 2008). Conversely, research shows that economic inequality is not a concept that is well understood by journalists or widely discussed in the media (Grisold and Theine 2017). A recent report of BBC coverage indicates how out of touch both journalists and the public are in relation to policies on taxation, public spending, government borrowing and debt (Blastland and Dilnot 2022). The report, which surveyed and interviewed numerous stakeholders including the public, indicates just how few members of the public understand this type of coverage (ibid.). Moreover, this report highlights that few journalists understand this coverage either. The report's authors note the following:

"We think too many journalists lack understanding of basic economics or lack confidence reporting it. This brings a high risk to impartiality. In the period of this review, it particularly affected debt. Some journalists seem to feel instinctively that debt is simply bad, full stop, and don't appear to realise this can be contested and contestable" (ibid. p. 4).

A good example of this would be Laura Kuenssberg who, in 2020, used a credit card analogy to describe government debt, implying that economic deficits are dangerous and the economy can be 'maxed out'. At the time Kuenssberg was the BBC's political editor and this could have had real consequences for the public debate, leading numerous leading economists to write and complain to the BBC (Wastell 2020).

However, not all journalists perceive their role as watchdogs, informing and looking out for the public interest. Many consider their roles as purveyors of the market, relaying events as they happen (Usher 2012). While the ideal role for a journalist may be that of a watchdog investigating corporate and political malfeasance (Starkman 2014), the roles journalists perceive for themselves can vary according to the country and cultural context (Hanitzsch, Hanusch, and Lauerer 2016), and even by the beat they cover. For instance, economics writers often write to inform policy and economic elites (Gittins 1995), and those reporting on finance usually report with informing the markets in mind (Usher 2012).

While consumption of economic and financial mainstream news is at a peak, research shows the UK public think journalists are not trustworthy and do not report with the general public in mind. Surveys undertaken at the height of Brexit negotiations (2018), and again at the height of the pandemic (2022), indicate that satisfaction in news about the economy remains low (Schifferes and Knowles 2022). Close to 80 per cent of the UK public surveyed in 2020 think journalists do not tell them enough about how economic developments affect them personally, followed very closely by the same number who think journalists are independent from their sources and provide content without jargon. Likewise, less than half of those surveyed, only 45 per cent, agree with the statement that journalists did a good job explaining the policies associated with austerity for them (ibid.). However, research shows that trust levels could improve if journalists provided more of the type of news that the public wants – namely, news about jobs written with minimal jargon (ibid.).

The crisis in journalism and rise in PR

However, what journalists want, and how they perceive their roles, is very different to the stark reality in the newsroom (Knowles 2020a, b). Even when there is a desire to report for the general public, there is a sense that it is too difficult to find the time to write for this audience (Knowles 2018). This has been compounded by what has become known as a 'crisis' in journalism. Journalists and editors face daily challenges to fulfil their roles, mainly in the form of commercial and time pressures, and the pressure to write about complex subjects in a way that will engage a wide audience. These pressures and a 'crisis' in journalism has exacerbated as news has digitised, social media outlets have a monopoly on information flows, and advertisers have gone elsewhere. Consequently, there is pressure to produce more stories with less time, which in turn decreases opportunities to seek alternative sources of information (Knowles 2018). Relatedly, media organisations do not always provide the training mainstream journalists require to understand economic concepts and be able to critique the information provided by experts (ibid.).

This crisis in journalism has contributed to a failure on the part of editors and journalists to critique the powerful, such as corporations and senior executives who are difficult to reach for comment and have their images polished and protected by public relations (PR) firms (Knowles 2020a). PR firms represent a formidable force in the production of economic news. As the Financial Times editor, Lionel Barber (2018), pointed out in his James Cameron memorial speech in London, there are now 4.8 PR people to every journalist.

In addition to industry and commercial pressures, there are ideological pressures to report along established lines, which leads to a phenomenon known as groupthink (Knowles et al. 2017). A growing body of research has pointed to mainstream economic and financial news content that has become increasingly narrow, pro-financial markets, and reliant on a few elite sources of information that operate within a feedback loop (Davis 2018; Knowles 2017, 2020a). While some exceptions do exist, such as the Guardian's economics editor Larry Elliott who critiques capitalism and the status quo, research indicates that journalists need more training to cover economic topics (Knowles 2020a). Studies of economic coverage indicate that the press have missed numerous opportunities to analyse a wider range of economic policy responses (Basu, Schifferes and Knowles 2018).

Suggestions to improve trust in economic news and financial literacy

Overall, surveys of journalists and the public show a missed opportunity. A significant number of journalists want to engage a wider audience in economic affairs, while the public think journalists do not write on these themes with them in mind. The audience that is least well served by journalists – young people and women from low socioeconomic groups – are not only the least engaged, but they also have the lowest economic literacy scores and lowest trust in journalism. Change is needed if the news media is going to contribute to a more informed citizenry on economic inequalities.

It appears that the quality of mainstream economic news content is declining just as it is most needed in a context of growing economic inequality and complexity. While there is strong (and often conflicting) evidence that economic journalists do indeed perceive themselves as watchdogs, the democratic role of the press is being tested further by a crisis in journalism and a deficit in trust in the news media. Low economic literacy among audiences, and journalists themselves, is another significant barrier – especially among young women and those on low incomes. The public needs support to engage with finance and economics. Since the 2008 financial crisis there have been coordinated efforts to survey the public's financial literacy (OECD 2017). The former chief economist at the Bank of England, Andy Haldane (2018), has been writing about the public's

lack of understanding about the economy and low trust in central banks, and the Bank of England has started a scheme known as econoME, which provides free educational resources. Another approach to this lack of financial literacy could be statutory financial and economic education through school curriculums. While more concerted efforts to improve the public's literacy in general would be helpful, ideally these strategies need to target the most vulnerable groups in society.

Also, media owners, editors, and practitioners will need to reconsider their commitment to public interest and create editorial strategies that are more inclusive of an under-served audience. Journalists, and especially those working for mainstream news outlets, need to be better informed about the challenges and barriers that sections of their audience face, and they too need to improve their financial and economic literacy so they can report on these topics with authority, ask the difficult questions, and hold power to account. Support from editors for their audience to develop financial literacy might include the creation of content that a wider section of society would engage with, and relate to, such as content that uses minimal jargon. Editors and journalists could foreground issues around the structural causes of economic inequality and consult a wider and more diverse range of sources for information (for an expansion of these ideas see Knowles 2022).

With a public that feels increasingly estranged from, yet dependent on, mainstream media for guidance, strategies to improve economic literacy are an idea that warrants further attention from both researchers and policy-makers. Currently, the way the economy is covered by the media serves a corporate and economic elite who continue to frame the news agenda. The production of economic news is an important tool for maintaining the status quo and policies that protect wealth, yet this is a topic that remains under-researched and under-theorized (Schifferes and Knowles 2022). Overall, improved economic literacy and improved public engagement in news on economic topics are crucial to improve public engagement in, and understanding of, inequality, economic policies, and the power structures that benefit elites.

References at the end of the text

Business elite networks: proxies, political consequences, and the impact of artificial intelligence on elite networking

Julián Cárdenas

Business elites, or those individuals in high-level positions of power within a company or industry, may choose to create networks for a variety of reasons. Networks can provide access to valuable information, resources, and other connections, which can help businesses. Networks can also be a way for business elites to exercise influence and control over multiple corporations, and to further their own interests and agendas. In addition, being a part of a network can provide opportunities for professional development and advancement. However, business elite networks can pose risks and challenges. There may be conflicts of interest among directors who serve on the boards of multiple firms, or concerns about the concentration of power and the potential for abuses of authority. In addition, the concentration of power and influence within a small group of individuals can lead to concerns about fair and transparent decision-making within an industry or market.

"The study of interlocking directorates can help to shed light on the broader social and economic systems within which business elites operate and can provide a valuable tool for analyzing the dynamics of power and influence among these elites."

Research on corporate networks has been an active field of study for more than a century. Scholars from a variety of disciplines, including sociology, economics, and business, have examined the relationships between powerful actors and how they interact with one another. This chapter reviews current approaches to researching business elite networks and future directions in research associated with the rise of Artificial Intelligence (AI).

A review of current approaches to studying business elite networks

There are several ways that researchers can study business elite networks, or the networks of relationships among influential individuals in the business world. Some common proxies, or indirect measures, that are used to study these networks include: interlocking directorates (holding positions on the boards of directors of multiple corporations), cross-ownership of shares (ownership of shares in multiple firms by a single individual or business group), joint ventures (business arrangement in which two or more firms come together to pursue a specific project or business opportunity), executive mobility (the movement of individuals between different firms can reveal connections and relationships among the firms that they have worked for), educational and professional

associations (membership in associations and attendance at events) and family ties (relationships between individuals who are related by blood or marriage within business organizations). This chapter focuses in detail on interlocking directorates.

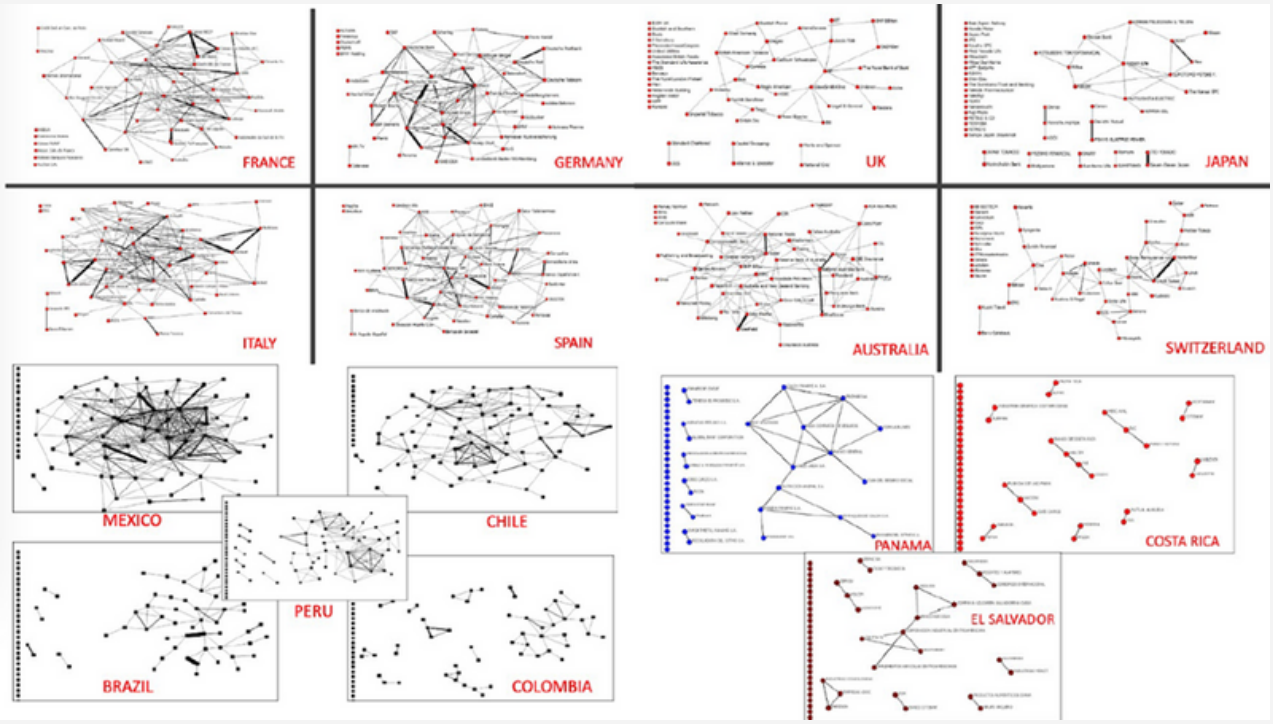
Although business elites can connect through several means—family ties, membership to exclusive clubs, school attendance and business associations—interlocking directorates has been the most used proxy to uncover how business elites are connected (see Caiazza and Simoni, 2019 for a bibliometric review). Interlocking directorates refer to the phenomenon where individuals hold positions on the boards of directors of multiple companies. This creates overlapping relationships and potential conflicts as the directors may prioritize the interests of one company over the other. For instance, Carlos Slim, the Mexican tycoon, serves on the board of directors of several companies, including America Movil, a telecommunications company based in Mexico, and The New York Times, a newspaper firm in the USA. These interlocking relationships can have significant impacts on corporate decision-making and governance, as the directors with multiple board appointments may wield disproportionate influence. Interlocking directorates have been the subject of much research and analysis, with scholars studying their prevalence, causes, and consequences within various economic and legal contexts. The study of interlocking directorates can help to shed light on the broader social and economic systems within which business elites operate and can provide a valuable tool for analyzing the dynamics of power and influence among these elites. The analysis of interlocking directorates can also provide insights into the degree of business cohesion or fragmentation within an industry or market.

Business cohesion refers to the extent to which firms within a given industry or market are connected through various forms of economic, financial, and organizational ties. These ties can include interlocking directorates. If corporations are highly interconnected through board members, a cohesive corporate network is configured. If corporations are poorly connected to each other, a fragmented or non-cohesive business network arises. High levels of business cohesion can indicate that firms within an industry or market are closely connected and may be more likely to coordinate their actions or collaborate in decision-making. On the other hand, business fragmentation refers to the lack of connections and ties between firms within an industry or market. In highly fragmented markets, firms may operate independently and may be less likely to coordinate or collaborate with each other. Understanding the degree of business cohesion within a market or economy can be useful for a variety of stakeholders, including investors, regulators, and academics studying the economic and organizational dynamics of industries and markets.

Network analysis is employed to measure to what extent business elites form cohesive or fragmented networks. In previous studies, scholars have selected the largest corporations for each country to capture the top firms and the people who rule these companies (Cárdenas, 2012, 2020; Cárdenas and Robles-Rivera, 2021). Annual reports of each firm provide data on the board of directors. Since studies were concerned with the networks of interlocking directorates, those directors who sit on two or more boards are retained and the rest are omitted from the analyses. These data is processed, visualized and analyzed using UCINET, a network analysis software package.

Previous studies reveal a variety of business elite networks in different national contexts. Business elites appear to form cohesive networks in counties such as Mexico, Italy, France, Germany, Spain, Chile and to some extent in Peru and Australia. While business elites tend to be part of more fragmented networks of interlocking directorates in countries such as Japan, Switzerland, Panama, Costa Rica, Brazil, Colombia, El Salvador, and United Kingdom (see Figure 1).

Figure 1. Networks of interlocking directorates in countries



Source: Cárdenas, 2012, 2020; Cárdenas and Robles-Rivera, 2021. Nodes represent the largest corporations in each country, and lines indicates directors who sit in several boards.

The debate over whether business elites are organized cohesively or in a scattered manner is not only a discussion about the internal organization of big business but is also a way of interpreting the capabilities of business elites to affect policymaking.
There is a debate among scholars about the impact of business cohesion. Some argue that cohesive networks can increase the bargaining power of business elites and facilitate opposition to policies that are not in the interests of large corporations (Fairfield, 2015). Building on that, cohesive networks can be used as a mechanism for state capture, in which business interests are protected against potentially damaging political initiatives. On the other hand, other scholars show that business cohesion can lead to the emergence of distributive and redistributive policies that benefit all parties involved and enable a normative consensus for the pursuit of long-term national interests (Cárdenas, 2020; Schoenman, 2014).

In order to investigate the impact of business elite networks on political issues, researchers have mostly employed two types of methods. The first is qualitative in nature, relying on in-depth interviews and case studies to conduct process tracing tests that evidence the connections between business elites and political decision-making. For example, Beamer (2002) examines ways to enhance the validity of elite interviews in state politics research, and Tansey (2007) discusses the relationship between process tracing and elite interviewing as data collection technique. The second method is based on the use of quantitative data analysis and is often complemented with network analysis to identify the extent to which large firms influence political outcomes. Studies have included node-level measures of network characteristics in standard regression models, thereby incorporating network concepts into explanatory models. For instance, Cárdenas and Robles-Rivera (2020) showed that a small set of family business groups form a cohesive cluster in Panama. This cluster directed its political campaign contributions mostly to one presidential candidate, and after the elections, business people closely related to this cluster were appointed to strategic government posts that regulate and define macroeconomic policies.

Business elite networks can be stable structures, with long-standing connections and relationships between individuals and organizations. However, changes in economic conditions, technological advances, and shifts in political and regulatory environments can all reduce the stability of business elite networks. In his book "The Fracturing of the American Corporate Elite", sociologist Mark S. Mizruchi examines the changes that have occurred in business elite networks in the United States over the past several decades (Mizruchi, 2013). Mizruchi argues that the business elites in the United States have become more fragmented and less cohesive over time, with corporate leaders increasingly focused on their own narrow interests rather than the broader interests of the business community and society. Mizruchi identifies several factors that have contributed to the fracturing of the corporate elite in the United States, including the rise of shareholder value as the dominant corporate goal, the increasing globalization of the economy, and the increasing influence of corporate lobbyists and sectoral interest groups.

Actually, there are more cross-sectional than longitudinal studies on business elite networks. The difficulty of obtaining data on business elites over a long period of years has limited our knowledge on the stability or change of network structures. However, recent advancements in technology and data collection methods have made it possible to conduct longitudinal studies of networks. These studies provide valuable insights into the dynamics of social structures and how they evolve over time. For example, Wright, (2022) collected data on interlocking directorates from 1910 to 2018, and identified patterns and trends that would be difficult to observe in cross-sectional studies. Brullebaut et al. (2022) studied, over the period 2006 to 2019, the evolution of networks of interlocking directorates among the top firms in France, Germany and United Kingdom and also observed the stability of the business network structures.

How will the artificial intelligence change business elite networks and interlocking directorates in the future?

Many business elites, including CEOs and other top executives, are using artificial intelligence (AI) in various ways to improve their operations: predictive analytics, investment in AI start-ups that disrupt the market, and management and optimization of portfolios (Zhou et al., 2022). AI has the potential to significantly impact and transform many aspects of business operations, and many business leaders are looking to take advantage of this technology to improve their performance and stay competitive in today's rapidly changing marketplace.

Artificial intelligence (AI) is transforming the business landscape in many ways, and one of the most significant ways it is doing so is by providing an alternative to traditional networks of political connections and interlocking directorates. Traditionally, access to important information and resources has often been mediated through networks of personal connections and relationships. This has created a system in which those with the right connections and relationships have been able to access opportunities and resources that are not available to others. However, the rise of AI is changing this dynamic by providing a more unbiased source of information. For example, AI-powered tools and software can analyze vast amounts of data and extract valuable insights that would be difficult or impossible for humans to discern. In this way, AI can provide businesses with access to information and insights that was previously only available through networks of personal connections.

In addition to providing access to information, AI is also being used to automate various business processes and tasks, such as data analysis, customer service, and marketing (Hilb, 2020). This is helping businesses to become more efficient and productive and is also enabling them to make better and more informed decisions. As AI continues to advance and become more sophisticated, it is likely that it will increasingly substitute the relevance of personal connections as the crucial source of information and influence.

However, while artificial intelligence (AI) has the potential to provide a wealth of information and insights, it is unlikely to fully substitute the relevance of political connections and interlocking directorates. AI can analyze vast amounts of data and extract valuable insights and trends, but it lacks the ability to provide trust, which is built over time through interactions and shared experiences. This trust is an important foundation for collaboration and cooperation within the business world and is often critical for accessing opportunities and resources. Additionally, politicians are influenced by a range of factors, including their constituents, campaign donors, and lobbyists, all of whom rely on personal contacts and relationships to shape political decisions.

There are five key research avenues that could be explored to better understand the impact of AI on business elite networks. First, research could examine how AI is being adopted and utilized by business elites. This could involve analyzing the types of AI technologies being implemented, the ways in which they are being used, and the impact they are having on business processes and decision-making. Second, research could explore the implications of AI for the structure and dynamics of business elite networks. AI has the potential to disrupt traditional power hierarchies and alter the way in which decisions are made within these networks. For example, AI could enable more decentralized decision-making processes, allowing for a wider range of viewpoints to be considered. Alternatively, AI could be used to reinforce existing power structures by granting certain individuals or groups greater access to and control over decision-making processes. Third, research could examine the impact of AI on the composition and diversity of board of directors and business elites. AI has the potential to both create and eliminate certain types of jobs, potentially leading to shifts in the types of individuals who are represented within the boards of directors. Research could explore the extent to which AI is driving changes in the demographics of business elites and the potential implications of these changes for diversity and inclusivity. Fourth, another research avenue could focus on the ways in which AI is changing the skills and expertise required for top leadership positions. As AI automates certain tasks and decision-making processes, the demand for certain skills may decline, while the demand for others may increase. Fifth, one potential research avenue is to examine the use of AI in the selection and assessment of candidates for board positions. AI algorithms could be trained on data about successful directors and used to identify the appropriate candidates. This could potentially lead to more diverse boards, as the use of AI may reduce the influence of unconscious bias in the selection process.

Research on the impact of AI on business networking is an essential area of inquiry nowadays, given the emergence of powerful AI tools and the complex nature of the phenomenon. To gain a comprehensive understanding of this impact, it is critical to undertake a comparative analysis of business networking cases that both apply and do not apply AI, which enables the identification of specific causal mechanisms underlying the observed changes. By using counterfactual analysis, researchers can examine the potential impact of AI on business networking by evaluating the outcomes that would have occurred in the absence of AI, providing valuable insights into the specific factors that contribute to the observed impact. This approach can provide a more nuanced understanding of the dynamic interplay between AI and business networking. In summary, the impact of AI on business elite networks is a rich and complex topic that offers numerous research avenues for exploration.

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'There is no alternative'? The role of the media in shaping public understanding about the economy

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Business elite networks: proxies, political consequences, and the impact of artificial intelligence on elite networking

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