

# **A Marxist Approach to Disability: Notes on Marx's Relative Surplus Population**

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## **Abstract**

*This article deploys a materialist theoretical and methodological framework to analyse and discuss capitalism's disabling phenomena. It is my intention to demonstrate how Marx's concept of a "relative surplus population" may be used to scrutinise capitalism's symbols, meanings, images, and practices which reproduce ableism as the norm. Bringing this concept to the centre of the analysis will help us rethink the impacts of class, race, ethnicity, gender, and disability on the working-class. I will argue that the neoliberal Ideology of Competence, reproduced in everyday life, is used to (1) strengthen and sustain the social division of labour; (2) disguise class divisions and meritocratic values and practices, and (3) preserve bourgeois, ableist, racist, sexist, and ageist practices. It is my expectation to contribute to the educational revolutionary debate insofar as the education of disabled people may stand as a counter-hegemonic practice alongside and intertwined with analyses of race, ethnicity, and gender in their intersections with the impact of class condition. Additionally, this discussion will also serve as a contribution to a critical approach to the neoliberal discourse of inclusion, which also involves issues of class, race, gender, and ethnicity. Thinking and rethinking these phenomena is part of action-reflection praxis of critical*

*educators. Thus, I perceive this paper as a contribution to this praxis and as a counter-hegemonic manifesto.*

**Keywords:** *relative surplus population, disability, capitalism, ideology, materialism.*

## **Introduction**

My objective in this article is to present a materialist perspective of the disabling phenomena engendered by capitalist practices, symbols, meanings, and images. I intend to critically approach the roundabouts that connect materialism, capitalism, disability, the ideology of competence, and the discourse of inclusion. It is my expectation to contribute to the educational revolutionary debate insofar as the education of disabled people<sup>1</sup> may stand as a counter-hegemonic practice alongside and intertwined with analyses of race, ethnicity, gender, and sexuality in their intersections with the impacts of class condition (Balibar & Wallerstein 2021; Collins & Bilge 2016). These characteristics “[...] are not additive forms of discrimination, but rather are mutually constitutive of each other [...] (Erevelles 2011, p. 177) and mediate each and every aspect of an individual's life.

Therefore, I am considering here these intersections within the broader sphere of transnational capitalism, and I am aware that they may vary at times depending on more situated practices. Furthermore, it should be noted that my main objective is to theoretically investigate Marx's concept of *a relative surplus population* and propose an understanding of capitalist practices towards disability within this concept. My considerations are grounded on the materialistic conception that “[m]en make their own history, but they do not make it just as they please; they do

not make it under circumstances chosen by themselves, but under circumstances directly found, given and transmitted from the past.” (Marx 1977, p. 15).

Despite Michael Oliver’s (1990, p. 25) arguments that the understanding of the disabling phenomena does not “[...] imply the endorsement of the theory of historical materialism”, I am convinced that Marx and Marxists may shed light on aspects of these phenomena that might skip the eyes of other theoretical frameworks (Erevelles 2011; Russel 2019). In this article, I address and question the usually naturalised discourse of competence as an axiom of capitalist and neoliberal practices. I will argue that taking Marx’s formulation of the concept of surplus population seriously is a fundamental theoretical and methodological exercise if one wishes to understand capitalism’s disabling phenomena (ableism). Additionally, this discussion will also serve as a contribution to a critical approach to the neoliberal discourse of inclusion, which also involves race, gender, ethnicity, and class.

In capitalist/neoliberal ideologies, practices, meanings, symbols, and images, disability is very much a discourse of contrasts between those called *abled* and the so-called *disabled*, the *useful* and those deemed *useless*, the competent and those considered *incompetent*. It is my understanding that the concept of disability is constructed upon socio-historical and cultural images (Vygotsky 1993) that draw on an ideological discourse of competence and neoliberal symbols and practices of productivity that regard some individuals as incompetents and disposable. Ableism, in this perspective, may be understood as “[...] a network of beliefs, processes, and practices that produces a particular kind of self and body (the corporeal standard) that is projected as the perfect, species-typical and therefore essential and fully human” (Campbell 2009, p. 5).

If we understand ableism as the pole of *fully human* under the practices of a capitalist society, hence the further away an individual moves from this ideal prototype the more violent is the dehumanising process that they may suffer (Goffman 1963; Erevelles 2011). While there have been of course direct acts of elimination of those considered deviants from the established norm (e.g., Amaral 1995; Goffman 1963; McGuire 2016), in order to scrutinise the concept of a relative surplus population and its relations to the disabling phenomena, I shall consider the concept of *structural violence*.

Capitalist disabling phenomena places those deemed disabled under a process of *Structural Violence* (Galtung 1969). Johann Galtung defines violence “[...] as the cause of the difference between the potential and the actual, between what could have been and what is”. (1969, p. 168). He goes on to indicate that “[v]iolence is that which increases the distance between the potential and the actual, and that which impedes the decrease of this distance” (idem). Galtung (1969, p. 173) argues that

Structural violence is silent, it does not show – it is essentially static, it is the tranquil waters. In a static society, personal violence will be registered, whereas structural violence may be seen as about as natural as the air around us.

Structural violence is a form of increasing this distance through practices, symbols, meanings, and images that are incorporated and reproduced in the social structure as natural, despite being culturally and historically reproduced.

Before I move forward, however, I will briefly present three fundamental elements of the structure of this text.

First, readers should not expect the commonly used inverted commas in words like *normal* and *abnormal* or *normality* and *abnormality*, for they also constitute part of the meanings embedded in a society of dualist antagonisms. In general, my concern about the politically correct is that it aims to change words and concepts and ignores the ideological foundations of capitalist practices<sup>2</sup>. I do not however ignore the materiality of discourse and discursive practices (for further insights on this topic, see McGuire 2016), but this is not the main objective of this article. Commonly, the changes are rather limited if social relations - and the material basis of social life - remain the same and continue to be driven by two antagonistic forces. That is to say that the *normals* will remain the normals, even if those in the *other pole* are called *abnormal*, *not-so-normal*, *different*, *special*, *wonders*, *miracles*, and so forth. For this article, it is sufficient to say that, when necessary, I shall use the concepts of *non-deviant* and *deviant*.

Secondly, my reflections are based on the historical and dialectic convergence of representations that are valid today and that support the idea of competence in *capitalism*. It means that I will not present a factual study of disability across time. Others before me have already brilliantly done that (see, e.g., Oliver 1990; Jannuzzi 2004; 2006).

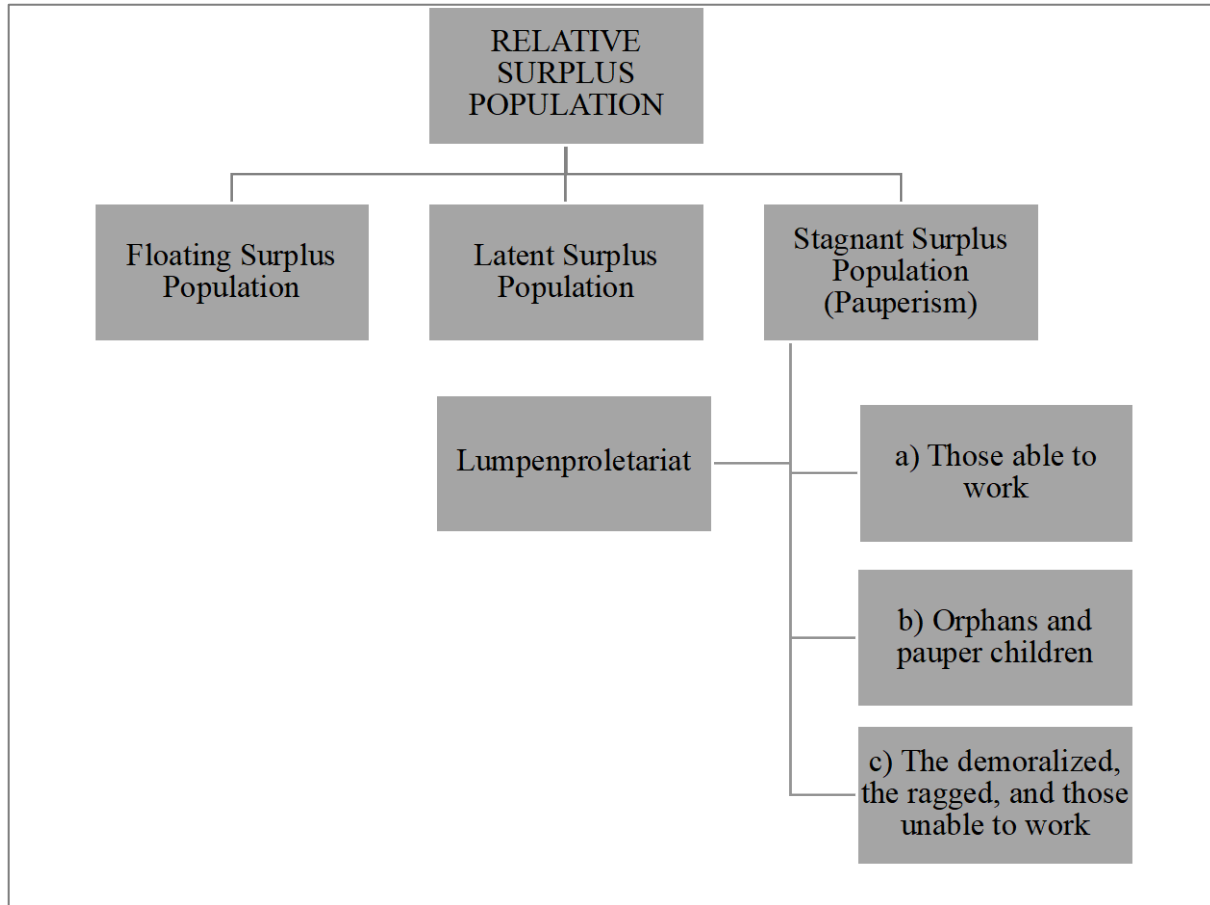
Lastly, and most importantly, the ideas of competence, incompetence, ableism, and disability are *not only* products of capitalism as a macro-system, *so much as they are also* dependent on more localised cultural conventions. Might it be recognised that I do acknowledge these concepts/ideas as cross-cultural concepts, as well as and I am aware of the divergencies that might arise depending on countries and even residual and emergent (Williams 1980) cultural practices in circulation.

However, for this article, I shall consider their ontology in the core of the ideologies of transnational capitalism as a macro and dominant structure.

### **Capitalism, Disability, and the relative surplus population**

I would like to start by establishing the grounds on which I shall build my reflections. My first and final argument is that disability in capitalism is a social product of the contradictions produced by the clash between forces of exploitation and forces of labour. It is rather important to clarify, perhaps to the despair of postmodern perspectives (Eagleton 1998; 2016; Harvey 1990), that I shall focus my considerations on what we could call a materialist universalising view of the body and the mind, a body and mind that are expected by capitalism, the *labour body/mind*. The body/mind that is *able* to work and to sell its labour force in the market, so that it may extract surplus value from this abled-to-work body/mind. The contrast of the abled labour body/mind is the disabled body/mind, which is a term “used to classify persons deemed less exploitable or not exploitable by the owning class who control the means of production in a capitalist economy” (Russel 2019, p. 42). Those “deemed less exploitable or not exploitable”, deviant from the ideal labour body/mind, may be considered part of what Karl Marx calls a Stagnant Surplus Population (Figure 1), or the third category of the Relative Surplus Population (floating, latent, and stagnant) or Industrial Reserve Army (Marx 1990) – discussed in chapter 25 “*The General Law of Capitalist Accumulation*” of the first volume of the *Capital*. Although a famous quotation amongst Marxists is commonly used to summarise the author's arguments<sup>3</sup>, I would like to linger a little longer on his discussion of the Relative Surplus Population in order to establish a theoretical connection between a stagnant surplus population and the materiality of the lives of people labelled disabled in the capitalist society of the 21<sup>st</sup> century.

**Figure 1 - The Structure of Marx's Relative Surplus Population**



Source: designed by the author based on Marx (1990, pp. 794-798)

Marx (1990, p. 794) argues that

The relative surplus population exists in all kinds of forms. Every worker belongs to it during the time when he is only partially employed or wholly employed. Leaving aside the large-scale and periodically recovering forms that the changing phases of the industrial cycle impress on it, so that it sometimes appears acute, in times of crisis, and sometimes chronic, in times when business is slack, we can identify three forms which it always possesses: the floating, the latent, and the stagnant.

David Harvey (2010, p. 145) clarifies that the *surplus population* is what “permits capitalists to super-exploit their workers without regard for their health or well-being”. Marx understands that there is a relation between the growth and accumulation of capital and the demand for a labour force, as capital expands so does the need for more workers - “[a]ccumulation of capital is therefore multiplication of the proletariat” (Marx 1990, p. 764). However, if the number of workers employed increases, so does the price of labour - an increase on wages - which means “a reduction in the unpaid labour the worker has to supply” (Marx 1990, p. 770). Despite its apparent simplicity, this movement is nevertheless more complex than it appears to be<sup>4</sup>, but it can be summarised as follows:

it is capitalistic accumulation itself that constantly produces, and produces in the direct ratio of its own energy and extent, a *relativity redundant population of labourers*, i.e., a population of greater extent than suffices for the average needs of the self-expansion of capital, and therefore a surplus-population. (Marx 1990, p. 782, *my highlights*).

For starters, we should not forget that the sole aim of the capitalist is to produce profit<sup>5</sup>. Capitalists are ruled by what Harvey calls “the coercive laws of competition” (2010, p. 146), in Marx's words: “a coercive force external to him” (1990, p. 381). When wages rise, they become an obstacle between capitalists and the maximum amount of profit that can be extracted. More elements will then come into place, among others, the intensification of the exploitation of the work force and the use of technology to increase productivity and profitability (Harvey 2010; 2011; Marx 1990).

One example that may be useful to illustrate such an abstract relation is that of bank workers in Brazil in the last 30 years. In the 1990s, bank employees in Brazil



created influential labour unions to exert pressure on banks, therefore demanding higher quality jobs - higher salaries, less working hours, more job places, amongst others. When going on strikes, until the early 2000s, those unions would still have some influence in the decision-making process in the organisation of banks. In 2020, the widespread use of the new technology, which allows users to solve most of their needs using their smartphones, has caused demands for higher productivity, wage drops, more working hours, and an increase in unemployment in the sector - industrial reserve army. While strikes of the sector in the 1990s were catastrophic (crowds of employees on the streets, freezing of banks, very little or no money available, the support of the population), a strike in 2020 gathers a few dozen with signs in the streets that are usually ignored by most passerby, looking down at their smartphones.

Leading us then to an important hallmark of capitalist labour exploitation practices: The Industrial Reserve Army as a regulator of the tensions between the exploiters and the exploited. As capital multiplies and grows, it also tends to follow two internal movements, namely *concentration* and *centralisation*. Respectively, the augmentation of capital and control of this capital in the hands of fewer people. At the other pole, it also produces what Marx called in the previous quote “a relatively redundant working population”, that is, the *surplus population* (Marx 1990, p. 782). This surplus population forms an army of workers who may at times be absorbed or rejected by the capital, according to the capital’s own needs (variation in the number of workers in a certain area), requirements (level of education, expertise, and/or experience), rules (wages/salaries, working hours, holidays, health insurance). In other words, “the working population therefore produces both the accumulation of capital and the means by which it is itself made relatively superfluous; and it does this to an extent to which is always increasing” (Marx

1990, p. 783). In the case of Brazilian bank clerks, the introduction of new technological machinery, as Marx calls it, allowed banks to dispose of thousands of employees and change the rules of the game, it developed new needs and new requirements.

The first category of the relative surplus population characterises workers that are “sometimes repelled, sometimes attracted again in greater masses” by the job markets (Marx 1990, p. 794). A modern example may be the situation of engineering workers in Brazil - when the economy is growing, they are the first ones to be absorbed and to get higher salaries and better conditions of work. However, as the economy slows, they are repelled by the companies, made redundant, and will be unemployed again.

The latent category represents those with potential to be part of the capitalist labour force but are in agricultural areas still struggling to survive with their own practices against massive capitalist companies; it is the representation of the death of a rural lifestyle. As cities and companies grow, they swallow small family farms and ranches, leaving those families with no other option but to sell their properties to the big companies, move to the cities, and sell their labour force. It is a situation portrayed in literature by Theodore Dreiser in *The Lost Phoebe* (1918) and by Graciliano Ramos in *Vidas Secas* (1938), and more recently in the American sitcom *The Ranch* (2016-2020), and vastly discussed in the works of Raymond Williams.

The last category, the stagnant, is formed by those who must subject themselves to the lowest conditions of work, to the most irregular forms of employment, and to

“a maximum of working time and a minimum of wages” (Marx 1990, p. 796) - a sediment of the working class that lives in the poorest conditions of life.

Now that we have reached the stagnant category, we should remember that when Marx is discussing the three forms of relative surplus population, he is categorising *workers*, in other words, those who are forced to sell their workforce because they do not own any means of production – *der Arbeitsmensch*. They are those who are *able* to sell their workforce; those who are at their full capacity in body and mind to create surplus value at the lowest cost, with the lowest adaptation possible, as it is remarked by Marx (1990) and by Engels (1987). In contrast, when dealing with disability, we are considering those who have been labelled by capitalist practices, symbols, and meanings as disabled, unproductive, and as a burden to the rest of the working class. A burden to the rest of the working class because “what becomes of the operative..., in case he cannot work, is no concern of the employer” (Engels 1987, p. 543). Engels here sheds light on an important element of our discussion: the class condition is a fundamental aspect of analysis when we are discussing disability.

Marx (1990, p.797, *my highlights*) enumerates three categories of those who dwell in pauperism –

the lowest sediment of the relative surplus population’, (1) those who are able to work but who are not working; (2) orphans and pauper children; and, finally, (3) ‘the demoralized (*sic*), the ragged, and those *unable to work, chiefly people who succumb to their incapacity for adaptation, an incapacity which results from the division of labour...*

Note that *here* he is dealing with the incapacity of adaptation. And he goes on to identify these workers as those “who have lived beyond the worker’s average life-span; and the victims of industry... the *mutilated, the sick...*” (1990, p. 797, *my highlights*). Marx approaches both the issues of ageism and ableism in the same category to indicate that those who are deemed useless by capitalist practices and excluded from the labour market will dwell in pauperism.

To clarify, pauperism is

The hospital of the active labour-army and the dead weight of the industrial reserve army. Its production is included in that of the relative surplus population, its necessity is implied by their necessity; along with the surplus population, pauperism forms a condition of capitalist production, and of the capitalist development of wealth. It forms part of the *faux frais* of capitalist production: but capital usually knows how to transfer these from its own shoulders to those of the working-class and the petty bourgeoisie. (Marx 1990, p. 797).

It seems to be implied that he differentiates *the surplus population* and *pauperism*. They are both conditioned to the ontological structure of the capitalist system and its ongoing wealth-making process. When Marx brings them together, he binds them, stating that one will be responsible for the other (the dead weight of the industrial reserve army), he is providing arguments against the traditional categorisation of disability as a personal and individual problem. Once again, disability is approached as a social, cultural, historical, and class-related issue.

In a recent study, Santos (2020) scrutinised data on the living conditions of the Brazilian population comparing and contrasting the categories of race, gender, and disability with class condition. The author identifies how these elements come

together to derail people's access to a flourishing life in a racist, sexist/ patriarchal ableism, neoliberal Brazilian society. According to her, 30,06% of the population with a disability live with within the range of 0-1 minimum wage (R\$ 1,100 reais) – in Brazil this means deprivation from a wide variety of essential goods and services, i.e., living in pauperism or close to pauperism.

From another geographical perspective, in the United States, according to Erevelles (2011, p. 56), “[...] “one out of every four disabled people lives below the poverty line, and more than 75 percent have an individual income of less than \$20,000.”

In the *Economic and Philosophic Manuscripts of 1844*, Marx discusses the existence (*Dasein*) of the *Arbeitsmensch* in the labour-capital relationship. He points out that “[p]olitical economy... does not recognise the unoccupied worker, *den Arbeitsmenschen*, in so far as he happens to be outside [the] labour-relationship” (1988, p. 86), that is, it does not recognise their *Dasein*, their existence. According to Marx, “they are *figures (Gestalten)*..., specters(*sic*) (*Gespenster*) outside the domain of political economy” (1988, p. 86). Those deemed less exploitable or not exploitable are *ghosts* to a system that values profit over anything else.

As I pointed out, when we consider the “class-disability” relationship in the working class, we are dealing with the sphere of pauperism – those on the lowest, poorest, most degrading conditions of life. These are either those who refuse to follow the system of discipline imposed by the capital or *those who deviate from the ideal labour body/mind*. Harvey (2010, p.149) points out that:

there is the problem of what to do with people who don't conform and are therefore dubbed odd or even deviant. And this is Foucault's as well as Marx's point: they are called mad or antisocial and incarcerated in insane asylums or prisons; or as Marx notes, they get put in the stocks, mocked and punished. To be a "normal" person, therefore, is to accept a certain kind of spatiotemporal discipline convenient to a capitalist mode of production. What Marx demonstrates is that this isn't normal at all - it's a social construct that arose during this historical period in this particular way and for these particular reasons.

According to Harvey, to be *normal* is to conform. Those who deviate will be labelled as abnormal, irrelevant, will be deemed useless, and set aside. So, *normality* does exist for capitalism – and it is very specific. On the one hand, it does not mean that we should simply accept it as a universal truth. On the other hand, we should not deny normality either but address it and question it.

Theoretical and methodological perspectives that aim to refuse the existence of these antagonistic forces – normality and abnormality – in capitalist practices, symbols, and meanings, in an attempt to promote equality and the so-called inclusion, contribute to the ontological reproduction of the system that created the antagonism in the first place.

Labelled as irrelevant and disposable to the political and economic structure, disabled people may be allocated in the Stagnant category of the Relative Surplus Population. In fact, even when they are absorbed by the system in times of need or when the system is forced to absorb them by affirmative action policies, those in the stagnant category “can be rendered superfluous at the slightest downturn of the business cycle” (Russel 2019, p. 76).

Barnes (1992, p. 55) defines disability as “a diverse system of social constraints imposed on people with impairments by a highly discriminatory society — to be a disabled person means to be discriminated against”. A social approach to disability, therefore, does not deny the impairment, but understands that there is a socio-historical difference between *impairment*, *disability*, and disabled: the impairment is biological, the disability is social, and disabled is the end result of disabling a person with an impairment<sup>6</sup>. Vygotsky (1993, p. 36) argues that “[i]n the final analysis, what decides the fate of a personality is not the defect [impairment in today’s terminology] itself, but its social consequences”. And it is this socio-psychological realisation that may or may not be a disabling one. In their development, disabled children will only require processes that will stimulate them in other ways rather than those traditionally applied at home, school, and any other social situation.

As deviants of the patterns of normality, however, disabled people are many times completely or partially deprived of social participation. Deviant bodies and minds are expected to either follow the stabilised rules of society or not be part of it at all. Let us take a scene in Jack Nicholson’s *One Flew over the Cuckoo’s Nest* as an example. His character, Randle P. McMurphy, is in the swimming pool of a total institution for those considered mentally ill and/or intellectually disabled and tells one of guards that within six days he is going to leave the institution. To his surprise, according to the guard, he will only leave the institution when allowed to, when the doctors and nurses consider that *he is able to adjust to social order*. Randle is only pretending to have a disability to dodge prison, but to many of his companions it means never leaving the institution, because according to the rules, requirements, and needs of the capital they have already been deemed deviant and

disposable or, as Harvey put it, they are “incarcerated in insane asylums or prisons [...] they get put in the stocks, mocked and punished” (2010, p. 149).

### **Disability and the Ideology of Competence**

As stated, I am not going to analyse the disabling phenomena beyond the sphere of capitalism, but rather to understand them as part of the complex system of ontological maintenance of the capital (Mészáros 2011). One way (not the *only* way) to do that is to approach, from a materialist perspective, the ideological discourse of competence. It unveils not only what is expected from the working class but also what is to be discarded. *Competence* is a concept that is in dialectical relation with the concepts of class, exploitation, and individual.

Social class, one's position in the economic and political structure of capitalism, will have a direct impact on the limits imposed on and possibilities opened up to individuals. That is, humans make their history, but they are determined by socio-historical forces beyond their control (Marx & Engels 1968). Therefore, a materialist reading of disability may largely contribute to deepen and expand the scientific knowledge around the disabling phenomena. Social class, albeit a commonly forgotten category in the analyses of disability, is an essential aspect of it. There are complex divergencies between facing an impairment in the higher classes, in the middle-classes, or in the lower-classes<sup>7</sup> (See Erevelles 2011; Cabral 2021; Russel 2019; Santos 2020).

Wright (1998) argues that *exploitation* is a grounding concept when it comes to class analysis because it creates a fissure between the higher classes (the owners of the capital, land, and means of production), who exploit, and the rest who are exploited. The development of capitalist relations, however, engendered new



classes, a class that originates from the social and technical divisions of labour (Wayne 2020; Wright 1998). The middle-classes are constituted by those in the working class who perform jobs that require more complex skills in contrast to those who are working in manual jobs - and thus tendentially share contrasting interests with them. These are also called in sociological works *primary and secondary sector jobs*, which respectively represent “those with high wages, high skill levels, good working conditions, job security, and ample opportunities for promotion” in contrast to “low wages, low skill levels, poor working conditions, little job security, and few if any possibilities for advancement.” (Barnes 1992b, p. 57).

Wayne (2020, p. 5) keenly highlights that

The social division of labour is linked to class formation because across the various branches of productive activity designed to meet variable social needs, the same social types in control of those branches have more in common with each other than they do with their immediate workers, who have the least control, least power and lowest remuneration in the production process.

The maintenance of class structure and the inducement of competition and individualism in the working-classes is a fundamental trait to the ontological continuation of capitalism. The social division of labour focuses on the formation of an un-critical, individualist, and indebted working-middle class with no sense of unity or class consciousness (Marx & Engels 2008; Mészáros 2008; 2011). The spread of meritocratic values amongst the professional and managerial strata of the working-class gives them a glamorous look and the false impression that they are

closer to the top than to the bottom, that they share more with those in power than with those in classes below them (Wayne & Cabral 2021).

The relevance of the discussion of class lies in the fact that when we talk about *inclusion without questioning capitalism*, we are usually referring to the right to enter the labour force and be exploited. Disability in the working-class demands the absence of one of the non-disabled members of the family from the labour market to provide care for the disabled member. This care may also be relegated to a philanthropic special institution - in the latter, allowing all working members of the families to be absorbed by the capital (Russel 2019).

It may be argued, however, that the concepts and definitions of what it means "*to be able to work*" are variable (Stone 1984). Indeed they are, but those are regulated by the State and by the capitalists themselves, and they vary not only influenced directly by pressures of society, but by the demands of the capital (Russel 2019). In other words, it means to say that their jobs and the place they occupy are both part of a regulatory system of the capital, as Russel (2019) argues, and a special kind of charity - in either case their workforce is easily disposable.

If we consider here Robert Young's (2009) analyses of Marx's concept of *use of value*, we may indicate that: in the Capital's commodity structure when those deemed *disabled* are exchanged, they are exchanged for less. Erevelles (2011, p. 252) argues that "[...] "becoming disabled is also a historical event where disability also has a use value that is deployed simultaneously with race to justify the creation of the enslaved un-gendered body." and that the "[...] actual act of impairment that is used both to create and at the same time to justify this construction."

Proof of that have also been the recent changes in the Brazilian legislation regarding the regulations for the mandatory employment of disabled people. Advancements in laws and legal regulations are indeed an important part of the struggles of the working class, but they “are ‘solutions’ which promote conflict between groups of disadvantaged workers, rather than making it a right of every citizen to have a living-wage job and health care” (Russel 2019, p. 77). They are part of what Mészáros (2008; 2011) regards as corrections in the structure of the capital. They play a fundamental role in the ontological conservation of capital when softening the tensions between the owners of the capital and the working class. Barnes (1992) advocated in favour of anti-discrimination legislation as a solution to improve the participation of disabled workers in the labour market, as we all should. No one would deny that even within the limits of the capital one should *always* fight against discrimination, prejudice, and deprivation of access to better living conditions. Notwithstanding, the market finds its ways to ‘dodge’ the legislation. When it comes to disabled workers that usually happens through what Samuels (2014) calls *biocertification*.

Biocertification is the process companies and industries use to certify that a new employee will follow their not-so-secret internal rules, using medical reports, exams, and tests. By means of biocertification processes individuals are reduced to their biological characteristics and are erased as social subjects, “[b]iocertification materializes the modern belief that only science can reliably determine the truths of identity and generally claims to offer a simple, verifiable, and concrete solution to questions of identity” (Samuels 2014, p. 122).

The structure of capital and its relations of material and cultural production, distribution, and exchange convey ideological models of individuals, social

relations, and patterns of social behaviour that must be assimilated to guarantee the right to actively participate in everyday life, from the most trivial activities to the most complex forms of social participation. These representations will revolve around the notions of gender, race, age, ethnicity, sexual orientation, and, in the case of the working classes, labour skills. They carry labels of *non-deviant* and *deviant*. The archetype of an ideal individual is linked to the project of society:

Hence, the oppression that disabled people face is rooted in the economic and social structures of capitalism. And this oppression is structured by racism, sexism, homophobia, ageism, and disablism, which is endemic to all capitalist societies and cannot be explained away as a universal cognitive process. (Oliver 1990, p. 165).

Oliver is arguing that the foundations of prejudice are in fact part of the ideological structure of capitalism. It a structure founded on an ideological and hegemonic set of “ideas, values, belief systems, habits and practices that defend and legitimise the interests of groups *at the expense of other groups in relationships of inequality*” (Wayne 2020, p. 136, *author's highlights*). Hence, it is important here to clarify my understanding of five concepts that are usually present in discussions of inequality, prejudice, and disability: *oppression*, *segregation*, *exploitation*, and *inclusion/exclusion*.

It is my understanding that, from a materialist perspective, they are all class-related issues. *Oppression* derives from the idea that due to one or more deviant characteristics one is deprived from access to some or all material, cultural, and social conditions that would allow them to carry on a fulfilling life or, as Wright (2019) calls it, a flourishing life. Oppression represents an image of someone being crushed, smashed, held (socially) against their own will and despite their own

efforts to change. Oppression is a product of ideologies embedded in the social structure of capitalism and it is related to inequality.

*Segregation* revolves around marginalisation. The social process in which those who are unable to follow one or more social expectations are centrifuged, sent to the borders of society. They are not welcomed to participate in everyday life. Segregation comes as an alternative to the idea of social exclusion, as we shall see below.

*Exploitation*, in turn, is the essential concept that sustains capital every day. The act of extracting surplus value out of those who own nothing else but their labour power (Marx 2012). Stripped of all properties and material conditions, workers have no way to sustain life other than by selling their labour power to those who own those material conditions. Modern capitalism, however, has become even more complex than it used to be when Marx's wrote *Das Kapital* (Wright 2019). In order to guarantee its own survival, the structure of class conditions was reshaped based on the social and technical divisions of labour. Different class interests will clash between those who own the capital, those in positions that require higher qualification and more sophisticated skills (the modern middle-classes), and the ones performing jobs that are socially characterised as lower jobs (Wayne 2020).

A material approach to these concepts understands that the condition of class will determine - imposing starting points, limits, and ends, as Williams (1988) and Wright (2019) define it - their extensions and impacts on an individual's life. It means to say that one may be segregated but not so much oppressed. So, the extent of the processes of oppression, segregation, and exploitation is class-determined.

Going back to Wayne's definition of ideology, he understands that:

there is capitalism itself which has a built-in cultural tendency to decontextualise social phenomena, individualise social phenomena and de-historicise social phenomena. We may also add that capitalism prematurely or falsely universalises capitalist culture and value systems (e.g., the only way to live) (Wayne 2020, p. 137).

Therefore, there is a paramount comprehension of capitalist practices when it comes to the analysis of the disabling phenomena. When we look at Marx's exposition of the sphere of pauperism, we were in fact targeting how this process of decontextualisation, individualisation, and de-historicisation affect those who are considered unable to adapt. Historically and traditionally, capitalist ideologies have treated disability as a personal, individual tragedy, which is brought out of context and history, in an attempt to exempt society from any obligations it might have. Against this, Russel (2019, p. 51) argues that:

Our institutions (particularly medical and social welfare institutions) have historically held disablement to be an individual problem, not the result of economic or social forces. They have equated disability with physiological, anatomical, or mental "defects" and hegemonically held these conditions responsible for the disabled person's lack of full participation in the economic life of our society. This approach presumed a biological inferiority of disabled persons.

Their deviation from social models of adaptation to everyday life and productivity in the cycle of the capital, established by social standards of normality, promotes processes of social marginalisation, from institutionalising policies of discrimination to deprivation of social participation (Barnes 2012; Bueno 2001; Ferreira 1994; Vygotski 2004). It is in and from everyday life that the concepts,

values, and norms that represent, regulate and organise a concrete social formation are executed (Heller 2016). Daily life is the expression of the real life of the subjects that are part of it, it is the immediate unity of action and thought and expression of concepts, values and norms formed from the hegemonic ideology conveyed and foisted upon individuals (Chauí 2016; Heller 2016).

Everyday life is ordinary thinking, common sense, and the expression of uncritical thinking. It is the embodiment of men's life, and it is from it that they express their truth, build their beliefs, and guide their lives (Heller 2016). Everyday thought, the common sense, is based on experience in the complex ideological network that maintains the socio-metabolic functioning of capital and aims at the “orientation towards stability and relatively quiet social reproduction” (Mészáros 2004, p. 486-487).

The process of stigmatisation in the case of disabled people permeates the complex social construction of everyday life. The distancing of adaptation to the patterns of normality established in everyday life crystallises the stigma and removes from the person with an impairment the condition of ‘human’ and projects it socially as the ‘non-human’ – as Marx’s pointed out a *spectre* to political economy. The representation of the stigma occurs by a reduction of the subject to only one of its characteristics - usually that which is downgraded or socially overvalued (Goffman 1963).

The possible overcoming of these conditions, or even the performance of more basic daily actions, can raise the stigmatised subject to the condition of superhuman, keeping them still in a non-human status. A stigmatised person may, however, reformulate the rules when they reach a position a social prestige. They

are taken to the level of representation of their group and will be considered the example of self-determination, meritocracy, and success (Goffman 1963; McNamee & Miller 2009; Wayne & Cabral 2021).

Leonard Kriegel (1987) scrutinised the images of representation of disabled characters reproduced in literature and narrowed them down to four categories, namely: *Demonic cripple*, *Charity cripple*, *Realistic cripple*, and *Survivor Cripple*. I will not discuss all of these categories, but the last one may be useful here to illustrate my previous arguments.

The Survivor Cripple “[...] is the man who endures and, in his endurance, discovers survival as a cause in itself [...]. His endurance is attractive, both to himself and to the audience, for it is constructed around his understanding of the limitations it has imposed on him.” (KRIEGEL, 1987, p. 38). The survivor cripple is the counterpart of the disabled person as pitiable and pathetic, as an object of pity, it is the representation of *meritocratic values* - the one who fights against all odds and thrives. The bridge between class conditions and the idea of a (disabled) survivor relies on capitalist meritocracy that seems to be reproduced in the image of the survivor, both in the lower and in the middle classes.

The image of the disabled person has been used as a motivational strategy, to trigger feelings of determination, and has been associated with struggle and the power to overcome difficulties, usually followed by the question “What is your excuse?”.

This may be perceived in the real-life based cinematic representations of disability, as they may imprint more credibility and cause a greater effect on the audiences.



The Survivor Cripple makes the impairment a *tragedy* and overcoming it *the objective or the solution to the problem*. The use of disability in motivational campaigns and films projects the disabled person as an object of ridicule and as their own worst and only enemy – “if they wanted, they could.” – and cement meritocratic values – “if they did, what’s *your* excuse?”. As examples, I could mention the biographical films based on the lives of Christy Brown (Sheridan 2008), Gabriela Brimmer (Mandoki 1987), and Stephen Hawking (Marsh 2014).

The decades after 1990 have been marked by various events and political and social reviews on the role and place of disabled people in society (Jannuzzi 2004). However, the system of justification and ideological reproduction of stereotypes in the categorisation of the socially conceived human body, the *labour body and mind*, as perfect permeates concrete social relationships in everyday life and triggers processes of stigmatisation of the deviants (Samuels 2014; Stone 1984). Stigma is thus very much in constant relation with the ideologies that are working through culture – as I have demonstrated with some examples in the previous paragraph.

Competence, structured by bourgeois ideological pillars, conveyed by the media, and absorbed by the cultural industry, sells signs and images of youth, health and happiness (Chauí 2016). It is a powerful method of manipulation that “inoculate[s] individuals with the bourgeois appetite for personal success” (Freire 1970, p. 147). The social process of constructing the discourse of the competent produces its dialectical counterpart, the incompetent. The social and ideological role of the competent, valued by the social power of science, as an unquestionable source of knowledge, underlies and justifies the domination and economic exploitation of

one class, considered superior in material and cultural capital, over the other, expropriated from the whole (Chauí 2016; Samuels 2014).

The analysis of perfection, based on a neoliberal ideology, established mainly after the 1980s (Harvey 2011), subjugates disability in the working class mainly to spaces of pauperism, marginalisation and segregation and is marked by the socio-political order and the power of science. The ideological projection of the perfection of productivity, sociability, independence, meritocracy characterises in the opposite pole the lack and the insufficiency, emphasising the defect and erasing individuals beyond their disability and making the construction of their social relations unfeasible (Barnes 2012; Heller 2016; Soldatic & Meekosha 2012a; 2012b; Vygotski 1993).

The naturalising element of capital is propagated and foisted upon individuals that reproduce the social structure through complex ideological systems of conservation, keeping individuals locked in the relationships of everyday life. Everyday life is, therefore, the life of every social subject, without being able to be totally out of it or completely trapped by it. It is in everyday life that the dominant metabolic ideological processes are emptied and reified as absolute and natural truths (Heller 2016; Mészáros 2004; 2016).

Mészáros (2005, p. 401) argues that the dominant ideology of capitalism is “[...] sustained by the practical evidence of the established material structures within which people have to reproduce the material and cultural conditions of their existence and ‘feel at home as a fish in water’”.

Most of the population is conditioned by the ideological standards set by the ruling class. Its ideological structure is:

a logical, systematic, and coherent set of representations (ideas and values) and norms or rules (of conduct) that indicate and prescribe to the members of a society what they should think and how they should think about it, what they should value and how they should value it, what they should feel and how they should feel it, what they should do and how they should do it. (Chauí 2016, p. 53).

The dominating force of ideology lies in pacification, naturalisation of the hegemonic social organisation and unity of interests, although they are conflicting (Mészáros 2008; Wayne 2020; Zizek 2012). Ideology, in its hegemonic sense, structures life lived and represents “a sense of reality for most people in the society, a sense of absolute because experienced reality beyond which it is very difficult for most members of the society to move, in most areas of their lives” (Williams 1980, p. 38).

It is in the everyday life that the ideological patterns of normality are executed. Heller (2016, p. 37) indicates that

[t]he maturation of man means, in any society, that the individual acquires all the essential skills for the daily life of the society (social layer) in question. It is an adult who is able to live his daily life for himself.

Ideological patterns of normality are socially and historically established attributes and characteristics that are reproduced as natural and ordinary and that categorise subjects as *normal* and *abnormal deviant*. They establish the norms that define what it means to be a socially desired human (Amaral 1995; Everlles 2011; Heller

2011). Stigma disqualifies the individual due to a singular characteristic that deviates from the ideological norms and standards imposed and determines the limits of their social participation.

Lastly, I would like to go back to inclusion. Inclusion is part of the ideological process of self-correctness and self-preservation of the bourgeois society. It is an attempt to lessen the weight of structural injustices, inequalities, segregations/exclusions that are part of the ontological foundations of the capital. Marx's thought elucidates how contradictory the concept is:

when analysing the production of relative surplus-value, that within the capitalist system all methods for raising the social productivity of labour are put into effect at the cost of the individual worker; that all means for the development of production undergo a dialectical inversion so that they become means of domination and exploitation of the producers. (Marx 1990, p. 799).

Some lines below, he famously concludes that:

Accumulation of wealth at one pole is, therefore, at the same time accumulation of misery, the torment of labour, slavery, ignorance, brutalization and moral degradation at the opposite pole, i.e., on the side of the class that produces its own product as capital. (Marx 1990, p. 799).

*Inclusion*, therefore, is the movement of opening opportunities to share material and cultural capital with (some of) those who were deprived from access to them. It does so without questioning or challenging the very essence of the society that created deprivation in the first place.

Inclusion and exclusion are part of the same dialects. One is the dialectical inversion of the other. The need to include only exists because of a society that engenders exclusion. Thus, as I suggested, exclusion might not be a real thing, in immediate cultural and material access perhaps it does, but not as part of the structure of the system itself, i.e., the individual is not *excluded* from the system, they are a product of it.

Inclusion and exclusion were uncritically adopted by all postmodern studies of identity, and inclusion became a motto to be fought for - as Wayne suggested (2020, p. 39), “change without real change”. In other words, these changes are constrained within the limits of capitalism and do not represent a threat to the structure of the system. Notwithstanding its core contradictions, it *is* something we shall all fight for. If within the limits and contradictions of the capital this is the only possibility - or the closest possibility - some individuals will have to access a flourishing life - meaning access to education, health, cultural expressions, housing, food - then until the whole system changes, perhaps it is what one should fight for. In the case of disabled people, it applies even to the access or opportunity of access to be exploited – as cruel as this may sound; that is what the “inclusion for disabled people” is in fact fighting for. In that sense, “[b]asic changes must be made in the economic, social, and political structure in order to advance economic solutions that reach beyond capitalism’s instability. The reserve army, itself, must be made a disposable concept” (Russel 2019, p. 77).

Despite the limitations of what Wayne calls (following Gramsci) *passive revolution* – “the paradox of massive change *within* the social relations of capitalism: change without real change” (Wayne 2020 p. 39, *author's highlights*) -, these seem to represent a possibility to improve the lives of those who are *now* in

need, not only focusing on disabled people, but also on other forms of discrimination as well. My favourite and paramount argument in that regard is that

Every reasonable and reasoned action proposed in an attempt to accelerate the social and political inclusion of the poor in the process of economic development in order to bring equality to social development is historically welcomed. As much within the scope of the State and its public policies as within civil society. It would be equally wicked to deny the diversity of the aspirations and intervention actions in the problematic reality.

(Martins 2012, p. 1).

Nonetheless, we should not be satisfied with them, for they do not interrupt the flow and the logics of the capital.

### **Towards a conclusion**

Zizek (2012, p. 3-4) approaches the different meanings and forms taken on by ideology and points out that

'Ideology' can designate anything from a contemplative attitude that misrecognizes its dependence on social reality to an action-orientated set of beliefs, from the indispensable medium in which individuals live out their relations to a social structure to false ideas which legitimate a dominant political power.

Hence, drawing on a materialist framework, my reflections upon the intersections between capitalism, disability, the ideology of competence, and the discourse of inclusion point towards the idea of the ideologies of competence and ableism as a naturalised and lived set of beliefs that saturates the consciousness of the individuals and shapes the reality and materiality of their social experiences and interactions with disability. Ideology, therefore, is not merely an illusion, it is what

we do and how we do it (Zizek 2012) all social spheres of our lived experiences, especially in what concerns our formal and informal educational practices.

I understand that for some the educational perspective of this paper may seem to have been left aside, however, as Revolutionary Marxist educators, our approach to and understanding of the disabling phenomena will have a direct impact on how we shape and design our educational practices. Thinking and rethinking these phenomena is part of action-reflection praxis of critical educators (Freire 1970). Thus, I perceive this paper as a contribution to this praxis. As Revolutionary Marxist Educators there are number of actions that can be taken in order to contribute to the process of alleviating the structural violence imposed on/suffered by those considered deviants, to mention only a few:

- 1) Promote educational debates/discussions/workshops in the *teacher education* process, integrating both disabled and non-disabled students and professionals. They should be organised in a way that encourages critical analyses of the intersections of class, disability, race, gender, ethnicity, and sexuality and daily educational practices in the classroom.
- 2) Provide access to and appropriation of cultural manifestations that approach the subject and critically analyse them with the students in higher and basic education.
- 3) Encourage further studies and research that critically scrutinise the capitalist disabling phenomena in the legal, cultural, scientific, and educational arenas.
- 4) Support the access and permanence of disabled students in regular education in the policy-making process.
- 5) Adhere to educational practices that consider the potentials of those with an impairment and not the limitations (Vygotsky 1993) – a form of education that facilitates the access to and the appropriation of scientific knowledge and culture.

If our praxis is built upon the premises that a critical and revolutionary education aims to transform lives and realities, hence, it is counter-hegemonic to recognise those labelled as *disabled people* beyond sociocultural and historical limitations imposed by capitalist symbols, meanings, forces, practices, and ideologies. It is our task to contribute to “the permanent transformation of reality in favour (*sic*) of the liberation of men” (Freire 1970, p. 92). Finally, I return to my first argument: disability in capitalism is a social product of the contradictions produced by the clash between forces of exploitation and forces of labour, it is, therefore, capitalism itself that must be overcome.

## Notes

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<sup>1</sup> In this paper, I follow the guidelines “Inclusive language: words to use and avoid when writing about disability” available at <https://www.gov.uk/government/publications/inclusive-communication/inclusive-language-words-to-use-and-avoid-when-writing-about-disability>. It should be noted, however, that I acknowledge that this not the terminology adopted in all fields, areas, and groups discussing social disabling phenomena (e.g., “*People first language*”, see: <https://odr.dc.gov/page/people-first-language>). I apologise in advance to all those who might feel offended in any way.

<sup>2</sup> See Eagleton (1991).

<sup>3</sup> “The greater the social wealth, the functioning capital, the extent and energy of its growth, and therefore also the greater the absolute mass of the proletariat and the productivity of its labour, the greater is the industrial reserve army. The same causes which develop the expensive power of capital, also develop the labour power at its disposal. The relative mass of the industrial reserve army thus increases with the potential energy of wealth. But the greater this reserve army in proportion to the active labour-army, the greater is the mass of a consolidated surplus population, whose misery is in inverse ratio to the amount of torture it has to undergo in the form of labour. The more extensive, finally, the pauperized (*sic*) sections of the working class and the industrial reserve army, the greater is official pauperism. *This is the absolute general law of capitalist accumulation.*” (Marx 1990, p. 798).

<sup>4</sup> It is not merely that an accelerated accumulation of the total capital, accelerated in a constantly growing progression, is needed to absorb an additional number of workers, or even, on account of the constant metamorphosis of old capital, to keep employed those already performing their functions. In its turn, this increasing accumulation and centralisation becomes a source of new changes in the composition of capital, of a more accelerated diminution of its variable, as compared with its constant constituent. This accelerated relative diminution of the variable constituent, that goes along with the accelerated increase of the total capital, and moves more rapidly than this increase, takes the inverse form, at the other pole, of an apparently absolute



increase of the labouring population, an increase always moving more rapidly than that of the variable capital or the means of employment. But in fact, it is capitalistic accumulation itself that constantly produces, and produces in the direct ratio of its own energy and extent, a relativity redundant population of labourers, i.e., a population of greater extent than suffices for the average needs of the self-expansion of capital, and therefore a surplus-population. (Marx 1990, p. 782).

<sup>5</sup> “The aim of the buyer is the valorisation of his capital, the production of commodities which contain more labour than he paid for, and therefore contain a portion of value which cost him nothing and is nevertheless realised [*realisiert*] through the sale of those commodities.” (Marx 1990, p. 769.)

<sup>6</sup> There have been recent changes regarding these categories. However, I will approach them here. For a more detailed discussion see Erevelles 2011.

<sup>7</sup> I prefer to use these categories in the plural because it seems to express their complexity and plurality.

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### **Filmography**

Gaby, a true story. Directed by Luis Mandoki. S.l.: s.n.,: Try Star Pictures, 2015 (1987). 1 DVD. (1h50min).

I am Sam. Directed by Jessie Nelson. USA: New Line Cinema, 2002. 1 DVD. (2h12min).

My Left Foot. Directed by Jim Sheridan. ITV Studios Home Entertainment, 2008. 1 DVD (99min).

The Other Sister. Directed by Garry Marshall. Australia: Warner Home Video; distributed by Marcom Projects, 2006 (1999). 1 DVD. (2h09min).

The Theory of Everything. Directed by James Marsh. Distributed by: Universal Pictures, 2014. 1 DVD. (2h03min).

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