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Equality: What, Who, Where?

John Baker

In everyday political discourse, as well as in the more rarefied discussions of academics, a number of different expressions are used to talk about equality. These expressions implicitly express a certain typology which, like many other everyday expressions, philosophers and other theorists are likely to use unreflectively or otherwise to misinterpret. The everyday language of politics is of course contentious and full of distortions and contradictions, and yet attending to some of its distinctions can help us to deepen our own thinking about equality. In this paper, I focus on three sets of expressions that are used in everyday politics and suggest that they characterise three cross-cutting ways of categorising equalities and inequalities, relating to the what, the who and the where of these relationships. The analysis not only results in a useful framework for studying equality and inequality but also reveals ways in which such studies are likely to be too narrowly constructed.¹

My starting point is to consider three groups of expressions commonly used in the non-academic world in particular, but also in the academic world, all of which belong to the same field of language, the ‘language game’ if you like, of equality and inequality. First, there are expressions of the form ‘(in)equality of x’, e.g. of income, power, respect. Secondly, there are expressions like ‘racial equality’, ‘ethnic equality’, ‘gender equality’ and ‘sexual equality’, as well as related expressions like ‘equality between men and women’, ‘equality for disabled people’ and ‘equality for lesbians, gays and bisexuals’. Then there is a third set of expressions that includes ‘economic equality’, ‘cultural equality’, ‘political equality’ and ‘legal equality’.

My concern is with how these three groups of expressions fit together. What I will argue is that the way they are related shows something about the structure of egalitarianism, and also, necessarily, about the way the normative theory of equality interacts with the sociology of inequality. To see this, we have to review certain debates in normative egalitarianism and in the sociology of inequality and then try to put the pieces together.

Equality of What?

Amartya Sen is credited with putting the question ‘equality of what?’ at the centre of normative egalitarian theory.² His point is that different egalitarian theories of justice since Rawls have been concerned with different answers to the question of what, fundamentally, should be distributed equally (or with priority for the worst off, or whatever). To put it in Cohen’s terms, what is the ‘currency’ of egalitarian justice?³ What is its ‘distribuendum’?

In answer to this question, Rawls says we should be interested in the distribution of primary social goods, Sen says we should be concerned with the distribution of capabilities to achieve valued functionings, Dworkin says we should care about resources, Arneson says (or said)

¹ This paper is the result of collaborative work in the Equality Studies Centre of University College Dublin and, in particular, work undertaken for John Baker, Kathleen Lynch, Sara Cantillon and Judy Walsh, Equality: From Theory to Action (Basingstoke: Palgrave Macmillan, 2004). It forms part of the research project on Equality and Inclusion in Ireland, supported by SEUPB’s Peace II Initiative in Northern Ireland and border counties. I am grateful to my co-authors, to members of the Political Studies Association of Ireland, to Eithne McLaughlin and Fran Porter, and to the editor and reviewers of Imprints for comments on earlier versions.


opportunities for welfare, Cohen says access to advantage.\textsuperscript{4} Even some of the people who say they are not interested in this debate have an answer to the question; for example, Young favours equality of self-determination and self-development.\textsuperscript{5} It seems clear enough that this is the locus of the first set of expressions I set out above, expressions of the form ‘equality of x’.

It is worth remembering, though, that regardless of how you answer Sen’s question about what equality should ultimately be about, other answers to his question don’t just disappear. Suppose you are fundamentally interested in equality of capabilities. That still means you are going to be interested in the distribution of wealth, income, power, status, education, work and so on – things that are broadly in the same ballpark as Rawls’s primary social goods – because how these things are distributed has a very important effect on people’s capabilities. You might not be committed to distributing all of them equally but you will still care about their distribution, and you will want them to be distributed in an egalitarian way, that is, in a way that reflects your commitment to whatever you think is the basic rationale of egalitarianism.

In \textit{Equality: From Theory to Action}, Kathleen Lynch, Sara Cantillon, Judy Walsh and I have taken something like this approach. We take the view that although it remains debatable what the answer to Sen’s question is, or even whether it has an answer,\textsuperscript{6} any normative theory of equality is likely to require you to pay attention to how certain kinds of good should be distributed – perhaps ‘deployed’ is a better word\textsuperscript{7} – in an egalitarian society. In particular, you will have to consider what we call five key ‘dimensions’ of equality because all of these dimensions have important and wide-ranging effects on the quality of people’s lives. The five dimensions we focus on are:

1. respect and recognition
2. resources
3. love, care and solidarity
4. power, and
5. working and learning.

Those are all terms that could be slotted into phrases of the form ‘equality of x’. Most of these dimensions of equality are familiar features of discussions of equality and social justice, although they are not always discussed in the same breath and are open to a variety of interpretations. Our conception of resources, for example, differs from some mainstream views because we include not just privately held material resources but also social and cultural capital, access to public services, environmental conditions and time.


\textsuperscript{7} In light of Young’s valid criticism in \textit{Justice and the Politics of Difference} of the misleading implications of the idea of distribution.
What is more unusual is bringing issues of love, care and solidarity under the umbrella of equality, since these have often been treated as alternatives to, rather than constituents of, equality and social justice. Recent work, particularly by feminist theorists, argues for their inclusion within theories of justice for at least three reasons. First of all, it is clear that various forms of love, care and solidarity are important conditions of human well-being. In infancy, illness and old age we are undeniably dependent on the care of others. More generally, the need and desire for love, care and solidarity is a central and perennial feature of human life. These relationships are just as important for how people’s lives go as the material resources stressed by traditional theories of justice. So the question of unequal access to these relationships is as normatively important as the question of unequal access to material resources.

A related reason for putting love, care and solidarity on the agenda of egalitarian theories of justice is that these relationships require work to sustain them. This work, which has typically been in the form of unpaid, under-valued work done by women, is one of the ‘burdens of social cooperation’ that theories of justice since Rawls have often mentioned in passing but nearly as often have failed to investigate. So even if inequality of access to relationships of love, care and solidarity were not an issue in itself, it would be important to name these relationships as important goods in order to draw attention to the inequalities of work involved in providing them.

This raises a third reason for treating love, care and solidarity as issues of egalitarian justice. It is that the process of providing these goods raises important conflicts of interest of the sort that it is the business of theories of justice to resolve. If human beings in general need love and care, and if it falls to individual human beings, traditionally women, to provide them, then there is clearly a potential conflict of interest between those who need them and those who provide them – a conflict that can easily lead to a lack of love and care for carers themselves. This conflict of interest cannot be addressed unless the interests in question are recognised in the first place.

In identifying love, care and solidarity as a key dimension of equality, we do not mean to imply that these concepts are interchangeable or to deny the potential conflicts among them. Clearly this is a complex family of concepts with important similarities and differences. But that is true, as well, in the other dimensions of equality, as evidenced by the variety of different kinds of resource. And if there are difficult questions about, for example, the possible tensions between sustaining intimate relations of love and more distant relations of solidarity, so there are also difficult questions about potential trade-offs between personal income, public services and environmental goods. Each of the dimensions of equality has its own complexity.

In our book, we use the five dimensions to analyse three different conceptions of equality, conceptions that we call ‘basic equality’, ‘liberal egalitarianism’ and ‘equality of condition’, but that distinction is tangential to the point of this paper. For present purposes the important point is that any normative egalitarian theory will have to say something, at some level, about these different dimensions.

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9 We discuss some of these conflicts in Chapter Three of Equality: From Theory to Action.
Equality Among Whom?

‘Equality of what?’ is not the only question that egalitarian theory has been concerned with. Another important question is ‘equality among whom?’ This question has bubbled along below the surface for a long time and has been particularly associated with the work of Young and discussions thereof.\(^\text{10}\) Most liberal-egalitarian theories answer this question by saying that we want equality among individuals, but Young makes a strong case for paying attention to equality among social groups. (Incidentally, Rawls’s view, despite its emphasis on the separateness of persons, is group-based insofar as the difference principle applies to representatives of socio-economic groups rather than to individuals, but I won’t pursue this here.)

Here again we can make a similar point to what I said about ‘equality of what?’, namely that even if your answer to this question at the most fundamental level is ‘individuals’, that does not mean that you should not be interested in relations between groups, because one of the most important factors that determines how individuals’ lives go is the way social structures and institutions work to privilege the members of some groups over others. If we look at the way societies are actually structured, there are clearly a number of unequal social divisions. Among these are gender, sexuality, disability, ‘race’ and ethnicity, class and age. This is not an exhaustive list: one can also find inequalities structured around religion, caste, belonging to an indigenous people, being an immigrant, being or having been a prisoner and so on. But it is a good working list for illustrating a lot of issues about egalitarianism.

It is clear enough that my second set of expressions is concerned with this kind of list. When we talk about gender equality, or equality for disabled people, or racial equality, we are concerned with equality between groups. These expressions are also linked to a number of other expressions like ‘sexism’, ‘racism’, ‘disablism’ and ‘ageism’, and to ‘homophobia’. It is noteworthy, however, that we do not find much evidence in ordinary English usage of the expressions ‘class equality’ and ‘classism’ (although ‘classism’ is used in some quarters\(^\text{11}\) and people do talk about class inequality). One possible explanation for this is that ‘class equality’ is strictly speaking a contradiction in terms, in the way that the others are not, because ‘class equality’ would involve the abolition of classes.\(^\text{12}\)

Equality Where?

There is a third question in egalitarianism that has not received as much attention as the first two I’ve mentioned. It might be called ‘equality where?’. To grasp it, it helps to make a very brief diversion into social theory, and in particular into ways of analysing societies into somewhat distinct social systems. In Marxist sociology, for example, there is a central distinction between the economic system – the base – and everything else – the superstructure.\(^\text{13}\) In Webersian sociology, there is a basic distinction between the economic system, the political system and the cultural system – what Weber calls the economic, legal and social ‘orders’.\(^\text{14}\) These systems are

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\(^{10}\) Young, *Justice and the Politics of Difference* and ‘Equality of Whom? Social Groups and Judgments of Injustice’.

\(^{11}\) See for example Maurianne Adams, Lee Anne Bell and Pat Griffin (eds), *Teaching for Diversity and Social Justice: A Source Book* (New York: Routledge, 1997). The most natural interpretation of the term is as a label for failures of respect and recognition within class-divided societies.

\(^{12}\) Nancy Fraser, *Justice Interruptus: Critical Reflections on the ‘Post-Socialist’ Condition* (Princeton: Princeton University Press, 1997). There are of course people who think that the solutions to homophobia and disability are to ‘cure’ homosexuals and eliminate impairment, but I take it for granted that these are not egalitarian policies.


also identified in the structural-functionalist theory of Talcott Parsons.\textsuperscript{15} I think it is fair to say that these days it is a sociological truism to distinguish between the economic system, the political system and the cultural system. The conceptualisation of society in terms of systems is thus a common assumption among theories that disagree over how these systems operate and interact. The systems can be defined in various ways, but for present purposes the economic system might be defined as the system concerned with the production, distribution and exchange of goods and services, the political system as the system concerned with making and enforcing collectively binding decisions, and the cultural system as the system concerned with the production and transmission of cultural practices and products and with the legitimisation of social practices more generally.

In our book, we argue that this Weberian trio neglects a fourth important social system, which we call the affective system: the system in society that is organised around providing and sustaining relationships of love, care and solidarity among people, and, through its failures and distortions, leaves some people loveless, uncared for, isolated, disliked, abused or hated. Attending sociologically to this system is of course the counterpart to attending normatively to love, care, solidarity and their opposites, and the sociological arguments for taking it seriously parallel the normative arguments for taking love, care and solidarity seriously. For if the operation and reproduction of social structures relies on at least some people’s needs for love, care and solidarity being met, then it is important to investigate how this is accomplished. Such an investigation will identify processes by which some groups are systematically privileged and others systematically burdened. It will locate and explain the conflicts that arise within these processes and how they are regulated by social institutions.

There is of course a certain arbitrariness in identifying social systems and distinguishing between them, since the idea of a social system is an abstraction from the concrete actions of social agents and the same actions can be conceptualised as belonging to two or more systems. Much of what goes on in the affective system can also be characterised as belonging to the economy, or to the political system, or to a society’s culture. But seeing these actions and relations as a system helps us to trace interconnections and patterns that get lost if things are looked at exclusively through the lens of economy, polity or culture.

In everyday language, people quite happily talk not just about the economic system and the political system, but about the educational system, the legal system, the transportation system and various other systems – systems that have a higher degree of specificity than the four systems I have mentioned and may be more or less closely connected to them. As before, regardless of what you think are the right fundamental sociological categories, there is going to be some place in your sociology for all of these social systems.

Returning now to normative issues, what I would like to suggest is that the everyday expressions in my third category – expressions like ‘economic equality’ and ‘political equality’ – relate to this sociological point; that is, they refer not to answers to the first two questions I raised but to the third normative question, ‘equality where?’ And I would make a similar point to the one I’ve made about the other questions, namely that even if your answer to ‘equality where?’ is expressed in terms of a wider, perhaps politically or geographically defined context, like ‘equality in Ireland’ or ‘global equality’ – and each of these wider contexts does raise specific issues of its own – you will have to look at what happens in these core social systems.

because that determines to a very great degree the amount of equality and inequality in any wider context. That is why, even if Rawls is wrong to say that the subject of justice is the basic structure of society,\textsuperscript{16} he is right to pay attention to basic structures.

All of this raises an interesting further question, namely what the relationship is between ‘equality of what?’ and ‘equality where?’? It seems to me that the typical assumption of political theorists is that there is something like a one-to-one correlation between the answers to these two questions. What I will call the standard assumption seems to be that economic equality is the same as equality of material resources, that political equality is equality of power and that ‘social’ or ‘cultural’ equality is equality of respect or status. If political theorists were to take the affective system seriously, the corresponding version of the standard assumption would be that ‘affective’ equality is the same as equality of love, care and solidarity.

An interesting theorist in this respect is Michael Walzer, whose book \textit{Spheres of Justice} would seem to be focused precisely on the question ‘equality where?’, but who organises his whole discussion around a list of answers to the question ‘equality of what?’\textsuperscript{17} The same kind of assumption seems to inform Nancy Fraser’s influential discussion of redistribution and recognition, where she identifies redistribution with the ‘political-economic structure of society’ and recognition with the ‘cultural-valuational structure’.\textsuperscript{18} The assumption can also be found in Weber, who seems to go even further in lining up a one-to-one relationship between who, what and where:

Whereas the genuine place of ‘classes’ is within the economic order, the place of ‘status groups’ is within the social order, that is, within the sphere of the distribution of ‘honour’. From within these spheres, classes and status groups influence one another and they influence the legal order and are in turn influenced by it. But ‘parties’ live in a house of ‘power’.\textsuperscript{19}

Another interesting example of the conflation of what and where is the widespread use of the ideas of a ‘family-friendly workplace’ and of ‘work-life balance’, at least if these are interpretable as saying that it is important to achieve a balance between the sphere of paid work with its associated monetary rewards and the sphere of personal relationships which are assumed to take place in the family.

By contrast, I want to suggest that the truth is almost completely different from the standard assumption. The simplest way of putting it is that in every social system there are likely to be inequalities in all five of the dimensions I mentioned earlier. For example, in the economic system, there are certainly inequalities of income, wealth and other resources, but there are also inequalities of power, of respect, of working and learning, and of prospects for love, care and solidarity. Similarly, in the political system, there are certainly inequalities of power, but there are also inequalities of politically relevant resources (money, social networks, cultural capital, etc.), of respect and recognition, of working and learning and of prospects for love, care and solidarity. The same could be said of the cultural system, the affective system and more specific systems like the educational system, the legal system and so on.

The bottom line is this. Rather than there being a one-to-one correlation between answers to ‘equality of what?’ and ‘equality where?’, they are two sides of a matrix. You can find

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\textsuperscript{17} Michael Walzer, \textit{Spheres of Justice} (Oxford: Blackwell, 1985).

\textsuperscript{18} Fraser, \textit{Justice Interruptus}, pp. 17-18.

\textsuperscript{19} Weber, ‘Class, Status, Party’, p. 194. See also pp. 180-1.
inequalities in each dimension in every system. So we need a conceptual map that looks something like this:

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<tr>
<th></th>
<th>Economic system</th>
<th>Political system</th>
<th>Cultural system</th>
<th>Affective system</th>
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<tbody>
<tr>
<td>Respect &amp; recognition</td>
<td></td>
<td></td>
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<tr>
<td>Resources</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Love, care &amp; solidarity</td>
<td></td>
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</tr>
<tr>
<td>Power</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Working &amp; learning</td>
<td></td>
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I said that the truth is almost completely different from the standard assumption because of course the different social systems do have special relationships to the key dimensions of equality. The economic system clearly plays a central role in generating and distributing material resources, while the political system clearly plays a central role in structuring relations of power: that is where the standard assumption comes from. But that is not much of a concession to the standard view.

A normative egalitarian theory, then, will have to say something, at some level, about how things should be ordered in each of the cells of this matrix. It may not claim that what we want in each cell is for there to be strict equality, but it will need to say something about what we should want in virtue of our commitment to equality as the core idea of the theory we espouse. One might mention in passing that a similar point could be made beyond the confines of egalitarianism, in relation to practically any theory of justice.

If the view I am putting forward is more adequate than the standard assumption, then it is also relevant to the question ‘equality among whom?’. Because it means that for each group difference, it is worth assessing how those groups are doing, in each of the five key dimensions, in each for the four major social systems, compared to what egalitarianism requires. Different groups are likely to come up with significantly different profiles, and this will surely affect their political aims and priorities. Since the political movement for equality depends on strengthening the already-existing coalitions among various disadvantaged or oppressed groups, it is important to identify where group priorities agree as well as where they diverge. Such an assessment can provide a framework for doing this.
Conclusion

In this paper I have linked some of the complexities of the everyday discourse of equality and inequality to issues in egalitarian theory. I have tried to show that this discourse highlights at least three different kinds of question for egalitarians, and that each of these questions can be addressed at different levels. The debate in political philosophy about the best conception of equality tends to assume that there is a single answer to ‘equality of what?’, that equality is fundamentally about individual human lives, and that questions of egalitarian justice are primarily concerned with arrangements within a relatively self-contained society. I have not challenged these assumptions directly. What I have argued is that even if these assumptions are correct, they in no way preclude us from paying attention to equalities and inequalities in several different dimensions, affecting several different social groups, and occurring in several different social systems. On the contrary: even if the philosophers are right about trying to find fundamental, monistic principles of equality, the application of these principles will inevitably involve working at the other levels I have emphasised. The fact that our everyday language of equality and inequality is designed to capture these levels is at least an implicit recognition of this fact.