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Investigating Equality

Edward Lewis of the *New Left Project* (www.newleftproject.org) interviews John Baker

John Baker is Associate Professor of Equality Studies at University College Dublin, and a member of the UCD Equality Studies Centre and the School of Social Justice. He is the author of *Arguing for Equality* and co-author of *Equality: From Theory to Action* and *Affective Equality: Love, Care and Injustice*.

Can you give an overview of key outlines of the field of equality studies, and of the work carried out by the Equality Studies Centre at the University College Dublin?

We think that the central concerns of equality studies can be expressed in terms of six interrelated sets of questions:

1. What are the central, significant, dominant patterns of inequality in our society, western capitalist society more generally, and, more generally still, the world at large? Since many people are unaware of the scale and patterns of existing inequalities, it's important to start with facts about the distribution of income and wealth, inequalities of status and power, obstacles to decent work and education and the denial of human rights more generally. One should also ask who enjoys, and who is deprived of, relations of love, care and solidarity, and how the work involved in sustaining these relationships is distributed. Within the Centre we are interested in the whole range of inequalities, including those relating to class, gender, 'race', disability, age, sexual orientation, religion and location.

2. What are the best ways of explaining these inequalities, using which overall frameworks? This question is at home in a range of academic disciplines including economics, sociology, politics and geography, but its answers are sometimes hampered by disciplinary boundaries. The Centre attempts to take an interdisciplinary approach.

3. What are the central principles or objectives of equality? What in principle are egalitarians trying to achieve? How strong are the arguments for and against these principles? Since there are many possible conceptions of equality, it's important to articulate these conceptions and explore their interrelations and relative merits. Within the Centre, we endorse a radically egalitarian vision that we call 'equality of condition'. In my view, there are a number of distinct, complementary arguments for this radical vision, relying on values that are widely shared.

4. What are the best institutional frameworks for achieving equality in different spheres and contexts? This is a question about social institutions, in the broad sense of economic and political structures, legal systems, educational systems, family forms and so on. Although there has been a tremendous amount of relevant work in this area, it has rarely had an explicitly egalitarian focus. Our work has tried to contribute here.

5. Within a given institutional context, what policies would best promote equality? Whether one is concerned with the 'utopian' question of a fully egalitarian society or the reformist question of improving the world as it stands, the state and other institutions face a range of policy options that may be more or less egalitarian. These choices need to be

analysed from an explicitly egalitarian perspective. The Centre has done a fair amount of this kind of work, often in collaboration with civil society organisations.

6. What are the best political strategies for promoting equality, given our vision of equality, our understanding of the causes of inequality, and the (corresponding?) obstacles to achieving equality? Egalitarian social movements have a wealth of experience in trying to achieve change, but it is not widely shared and a lot of movements end up reinventing the wheel. It's important to analyse that experience in light of broader considerations about how change occurs. The Centre tries to facilitate the sharing of this knowledge through its links with Irish social movements.

I wouldn't say this is an exhaustive list of questions but it is enough to be getting on with. What's clear is that, to paraphrase Marx, equality studies aims not just to understand but to change the world. It is therefore essentially normative and sees knowledge as having a role to play in transforming social structures. As an unavoidably political form of enquiry, it is rooted in and aspires to express the understandings and priorities of egalitarian social movements.

The Equality Studies Centre was set up first in 1989 as a basis for offering a new, interdisciplinary master's degree programme, and we've gradually branched out to do research degrees, outreach programmes, undergraduate modules and collaborative research. When UCD was reorganised into Schools in 2005, we joined forces with Women's Studies to form a School of Social Justice. The Centre's official role is now confined to research and professional development.

You argue that equality is a complex value. What do you mean by this? Is it politically significant that we appreciate the complexity of equality?

I do think equality is complex, but I want to say initially that I don't think it is a particularly *arcane* value. I would not want to promote the idea that it is all so complicated that people should feel politically paralysed about calling for a radically more equal world. But I think that if we reflect on equality, not just in a purely theoretical way, but by thinking about the aims and ambitions of recognisably egalitarian movements, we have to acknowledge that equality does have a certain complexity.

One of the well-established questions in egalitarian theory is 'equality of what?' – what is it that we should demand equality (or at least *more* equality) *of*? I think it's obvious that we should call for more equality of income and wealth. But egalitarian movements have also always been interested in more equality of status or respect or 'recognition', and not necessarily simply because these are necessary conditions for more material equality. There is also a long history of struggles for greater equality of power, expressed in the call for more democratic forms of decision-making both in formal politics and in other settings. In addition, egalitarian movements have demanded more equality in relation to working and learning, sometimes expressed as the rejection of discriminatory access to education and employment, sometimes expressed as a criticism of engrained divisions of labour including the gendered division of care work, and sometimes more ambitiously expressed as a demand for a life full of self-developing and self-realizing working and learning. The egalitarian tradition also embodies a concern for issues of love, care and

solidarity, sometimes focusing on the way individuals and groups have been subjected to violence and abuse, sometimes focusing on the needs that all of us have as human beings for the love, care and support of others.

Taking all these together, there is at least at this level a clear complexity in the egalitarian tradition's answer to 'equality of what?' – there are many dimensions of equality. Although some philosophers have attempted to find an answer at another level of thinking that simplifies this complexity – for example by saying that all these demands are part of a general struggle for everyone to have an equally good life – I think that this kind of move hides complexity rather than removing it, partly because a good life is itself a complex idea.

A different kind of complexity within egalitarianism concerns the question of *who* should be more equal. One answer, the dominant one in contemporary political theory, is to say that we want equality among all individuals. People who are involved in egalitarian movements, as well as people who study persistent patterns of inequality, are more likely to say that we should also be looking at reducing inequalities between groups – that reducing the overall inequality of income among individuals, for example, while perpetuating an inequality of income between men and women, is less desirable than attacking that gender-based inequality as well. Because, as I mentioned earlier, there are many different, cross-cutting social divisions that are marked by structural inequalities – divisions such as class, 'race', gender, disability and sexual orientation – it is of course a complicating feature of inequality and therefore of the ideal of equality that promoting greater equality with respect to one of these divisions is not necessarily tightly connected to promoting it in relation to another.

A third complication of the ideal of equality is that when we reflect on what exactly the ideal of equality requires in a particular dimension with respect to a particular social division, it is not always obvious, and it's certainly a matter of argument, whether what we should be calling for is as much equality as possible or something else. For example, most self-styled egalitarians who think about the distribution of income would argue that it's OK to have inequalities of income that reflect differences in people's basic needs; some also believe that it's acceptable for people who work longer hours or have more burdensome work than others to have higher incomes. We can still think of these positions as 'egalitarian' but they show that egalitarianism is not always about simple equality.

I want to pose an initial objection to the idea that equality really is intrinsically valuable. Suppose that we have a world in which there is inequality, but in which everyone's lives are better than in some other more equal world. Isn't it obvious that we should prefer the first world? And isn't that because what we should really be concerned with is how good everyone's lives are, rather than how good or bad they are relative to the lives of others?

You've expressed this objection in a very abstract way, in terms of 'how good everyone's lives are'. That formulation raises a lot of complications, so to make the reply a little simpler let's focus to begin with on people's material standard of living.

The objection is a powerful one, and is central to the work of John Rawls, but I think it is mistaken. One set of strong replies to the argument, which was developed by G.A. Cohen (and for the full exposition of which I'd refer you to his book *Rescuing Justice and Equality*), goes something like this. Let's accept for the sake of argument that your first world is better than your second. But then there is a third conceivable world with the same total material output as the first, but with its being equally shared. Why not compare your first world with that one? Your argument depends on assuming that worlds 1 and 2 are the only possible alternatives and that world 3 is *not* possible. But why should we assume that? World 1 consists of a population engaged in a set of productive activities yielding a total product that is unequally distributed. We can easily *imagine* those same people engaging in those same activities, yielding that same product, but with its being equally distributed, i.e. world 3. If world 3 is not possible, it must be because some of those people – namely those who have a higher-than-average standard of living in world 1 – *will* not engage in those activities without being paid a premium. But refusing to do something is not the same as its being *impossible* for you to do it, nor does your refusal to do it *justify* your not doing it. As Cohen points out, someone who has kidnapped your daughter may refuse to release her without getting a ransom, but that doesn't mean that he *can't* release her or that his ransom demand is justified.

Another strong set of replies, which uses a broader idea of people's lives being better off, has been recently set out very powerfully by Richard Wilkinson and Kate Pickett in their book *The Spirit Level*. They produce very strong evidence for the conclusion that among relatively affluent societies, those with greater material equality do much better overall than more unequal societies. There are higher standards of health, lower mortality rates, lower levels of crime, lower rates of drug abuse, higher levels of education, higher levels of trust, and so on. These positive effects show no relation to how prosperous the society is, or even how prosperous its worst off group is in international terms, but they are significantly related to how unequal people are within the society in question. To put it in the abstract terms of your question, they show that once a certain level of material well-being has been reached, it is actually very hard to find real-life cases in which everyone in a less equal society is better off than everyone in a more equal one. What is standardly the case is the opposite: that nearly everyone in a more equal society is better off than their counterparts in a less equal one, even if that less equal society has a higher average income.

You might object that neither of these replies shows that equality 'really is *intrinsically* valuable'. That doesn't bother me because I've never based the case for equality on the idea of its being *intrinsically* valuable – in fact, I have always had a hard time understanding what that means. Instead, I think that there are a lot of complementary arguments for equality, one of which is, indeed, that people are generally better off in more equal societies than in less equal ones. More specifically, more equal societies are better at meeting everyone's needs. They are also more consistent with everyday ideas about mutual respect and with ideals of human solidarity. Those are all arguments for the value of equality, but not necessarily for its being 'intrinsically' valuable.

Can you describe your ideas for how to implement equality in the following domains.

This is really a hard question for me to answer, partly because it is so vast and partly because I do not think of myself as having expert knowledge in this area. So you should treat these answers as deliberately sketchy and, even more than in other cases, thoughts that are open to revision. All these answers rely on the collective work we have done in the Equality Studies Centre, but I hope you won't blame my colleagues for shortcomings in my answers.

(a) The economy

It is probably useful to distinguish between more and less reformist answers to this question. The more reformist type of answer is one that assumes the continuing dominance of capitalism and looks for policies that produce more egalitarian outcomes. We know that some capitalist countries have much more egalitarian economies than others; their institutional arrangements can be adapted in various ways. For a start, we could aim for much greater equality of pre-tax incomes. That is partly a matter of custom and convention, to do for instance with what people in the upper reaches of the income distribution demand or are ashamed of demanding as salaries. It is partly a matter of unionization and of the priorities of trade unions. Legislation, e.g. minimum wage laws, can also play a role. We can achieve a more equal post-tax distribution by having a more progressive tax and benefit system and higher levels of public spending, which we in English-speaking countries think of as the 'Scandinavian' model.

Bearing in mind the other dimensions of equality, we should also be looking for more democratic forms of decision-making within workplaces and stronger rights for trade unions as ways of reducing power inequalities; a stronger appreciation of the contributions of all workers as a way of reducing inequalities of esteem; tougher equality legislation, working conditions regulations and job enrichment programmes as means for reducing inequalities of opportunity and of the experience of working; and making work practices less competitive and more cooperative, as well as more family-friendly, as a way of increasing solidarity. I think that the policy of introducing a Basic Income (sometimes called Citizens' Income), i.e. a universal payment that is not conditional on work, willingness to work, income, wealth or status, could play an important role in achieving greater equality. All of these policies are to some degree compatible with the continuing dominance of capitalist economic arrangements, although those arrangements are always a threat, not least for the very central reason that within capitalist economies, work itself is treated as a commodity that is to be bought and sold like any other.

That's why we have to consider less reformist, more transformational answers to achieving equality in the economy, changes that replace the capitalist system with a system of social ownership and control of production, if we want to achieve real equality of condition. Among the core principles of such a system would be democratically controlled workplaces and a massive compression of income inequality; I would see basic income as playing an important role there, too. On the issue of how to coordinate production and consumption and to allocate labour, I find it hard to imagine solutions that

do not make use of *some* aspects of markets but I have not been able to study models of socialism deeply enough to have confident views on how a radically egalitarian economy would be organised.

(b) Education

Here I think the most important point is that the capacity of the educational system to deliver egalitarian outcomes is massively limited by the economic inequalities that surround that system. There is a widespread belief that we can somehow use education to produce equal opportunity (and possibly even greater economic equality) without doing anything to limit economic inequality now. That seems to me to be a delusion.

As with the economy, I think we can distinguish more reformist from more transformative approaches. Within largely unchanged structures, we could still do quite a lot to promote equality within education. We could give more recognition to other forms of ability than the linguistic and mathematical skills that are currently most rewarded in schools and colleges. We could do more to accommodate disabled students. We could reduce gender stereotyping in the curriculum and in subject choice. We could be more robust in combating racism and homophobia. We could eliminate selection, streaming and private schooling. We could give students more control over their own learning. We could provide decent support for third-level students. We could expand and support participatory and community-based education. We could value the educational system as a public service and row back from the way that neoliberal, market-inspired practices have infected it at all levels. We could pay more attention to the quality of every student's day-to-day experience as opposed to the 'learning outcomes' we aim to achieve. All of these policies are the focus of ongoing debates and struggles.

A more radical, transformative vision of education would aim to nurture every person's self-development in a way that recognised the role of education in preparing people for making a productive contribution to society but was not dictated by the demands of capitalism. As someone who was impressed by Ivan Illich's *Deschooling Society* at an early age, I would be quite sympathetic to a vision of education that radically rethought the purpose, structure and even need for schools in their current form. Certainly I would envisage them as thoroughly democratic settings where learning took place more creatively, more autonomously, more questioningly than in most present-day schools. I realise that that's a very broad, vague vision but it's the best I can do.

(c) The 'affective' sphere

Just as you can think of the economy as the set of social practices primarily concerned with the production and distribution of goods and services, so you can think of the affective sphere or system as the set of social practices primarily concerned with meeting people's needs for love, care and solidarity. As a social system, it includes not just families and other household groupings but also a wide range of other practices and institutions, some of which also belong to the economy and/or to politics. For example, in everyday workplaces there is a whole layer of activity that consists in people forming

caring bonds of friendship and solidarity. We see that as belonging to the affective sphere as well.

A long tradition of feminist politics and scholarship has shown that in a truly egalitarian affective sphere, the burdens and benefits of loving and caring would be much more equally shared between men and women. That would require not just a big change in people's attitudes but also in how paid work is organised, so that everyone had more time for caring both outside and inside the paid workplace. I think that egalitarians also have to resist the degree to which caring has become commodified in contemporary capitalist societies. It's not that people shouldn't be supported materially for their care work – on the contrary, I and others have argued that one way of supporting care work materially is through the use of a basic income. Nor am I against people doing care work for a living: a lot of the care that is done in all advanced capitalist societies by paid workers could have a place in an egalitarian society, too. But that care work, which occurs in children's homes, hospitals, residential care units for older and infirm people, hospices, and so on, should be treated as part of the public services, not as a commodity that should be bought and sold just like any other.

One way of promoting affective equality is simply to aim for the permeation of relations of love, care and solidarity throughout society – to try to expand the affective sphere in all directions. In this respect, I think egalitarianism ties in very closely with what feminists call the ethics of care.

5. You argue that different movements seeking particular forms of equality - such as the disability rights movement, the labour movement, the feminist movement, the anti-racist movement, and so on - can collectively be seen as forming the 'equality movement'. However, the equality movement only exists in a loose and diffuse sense. Do you think that different egalitarian movements will all be stronger if they consciously work together to make the equality movement a real political force?

I do think that, because I think that all of these movements are motivated by the same basic values *and* because their members mostly recognise – or at least aspire to recognising – that all of these movements have valid egalitarian claims. So, for example, the labour movement must recognise, and generally claims to recognise, that its demands and internal practices should be consistent with those of the women's movement, and vice versa.

I don't think there is anything novel about the suggestion that all of these movements are closely connected, that they should consciously work together or that they are stronger working together than independently. But I think that people don't always acknowledge that the idea that connects them all up is equality. So sometimes they are just thought of as 'progressive' movements, or (more controversially) movements of 'the left'. Which of course raises the question: what is the left? It has always seemed to me that the best way of answering that is with the idea of equality.

Do you think the equality movement should seek to have a close involvement with academics and intellectuals? What obstacles are there to the involvement of such people being fruitful?

I have never been that happy with the term 'intellectual' because it seems to imply that only a fraction of people actually think about anything. Human beings are by nature intellectual. 'Academic' is a different kind of word because it refers to a paid occupation. I do think that the equality movement should involve academics, not just because it should involve people from all walks of life, but because academics can bring perspectives and knowledge to the table that they have had the privilege of developing over many years of study. But I think that everyone has a perspective and a lifetime of knowledge to contribute to egalitarian change and that we need to acknowledge this huge wealth and diversity of knowledge as a strength. There are many ways that anti-egalitarians are better resourced than we are, but the breadth of our knowledge will beat theirs any day.

Among the obstacles to the involvement of academics, there is of course the danger of academics thinking that they know it all, and conversely of an anti-intellectualism on the part of others. I have not found either of these to be particularly serious problems but they do exist. Again, because academics are generally specialists in a particular area, and passionate about that area, they are as liable as others to think that their own concerns matter more than other people's – but that is surely a general problem in any movement, not something peculiar to academics. What is probably a bigger obstacle is that there are a lot of pressures on academics to put their energies into activities that are not particularly fertile politically. In both the UK and Ireland, there is a huge emphasis on academic publishing, particularly in journals, and although I can think of some academics who are able to do that in a way that has a consistently political impact – if only in the first instance by contributing to the understandings of other academics – it is not always so. In one way, this is just a specific case of the general problem that most people's jobs require them to do work that is not particularly useful politically, and that leaves them little time and energy to be politically active – contrary to what people may think of us, most academics work quite long hours and do not have a lot of spare capacity for political engagement. I think that what's specific to academics is that, in Europe anyway, most of us are public sector employees whose job descriptions could include service to the community, so it could actually be part of our jobs to be engaged politically. I think that in the past it may have been easier for academics to spend a decent proportion of their actual work-time doing research and engaging publicly on matters of political importance; there seems to be less opportunity for that now.

Ireland is further down the road of savage austerity measures than the UK, though with yet more to come. Is this a climate which threatens the independence or indeed the existence of the Equality Studies Centre? On the other hand, has the Centre been able to engage in work which challenges the cuts agenda?

The cuts have certainly affected us. We have lost staff; there is doubt over whether anyone who leaves would be replaced; there is a lot less funding available for research; our partners in the community sector have been very badly hit; neoliberal practices in the

university have been reinforced. Our independence has never been at stake, but our capacity has been weakened.

The current crisis has, however, created an anger in Irish society, and an interest in how it has come to pass that a tiny elite has imposed such a burden on the rest of us. It has also galvanised political action at a number of levels. We do try to contribute to that, within our capacity. But another measure of our contribution is that many of the people we have worked with as students or community partners have become very active in these forms of resistance and in presenting alternatives to the dominant views. We hope we have helped to enable them, as they have also done so much to enable us.