CHAPTER 4

Equality

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INTRODUCTION

Among the billions of human beings in this world, innumerable inequalities abound. People are different and unequal in many respects. They belong to different races, religions, sexes, and so on. Their physical, genetic and mental endowments are also dissimilar. People differ with regard to their dispositions and abilities and the ways in which they lead, and are taught to lead, their lives. The range of inequalities and disparities that humanity displays is indeed very wide and this is an empirical fact.

Yet, as humans, we believe, and rightly so, that we are essentially equal and possess equal worth especially when it comes to realizing this ideal in social, economic and political structures of our society. We invoke the concept of equality when we want to be counted as an equal, to be treated—and aspiring or claiming to be treated—as an equal, to be equally entitled to social goods. But what does it mean to be treated as an equal? What sense do we make when we say that irrespective of our differences and certain inequalities—whether as Brahmins or Dalits, black or white, men or women—we, as humans, possess *equal* worth? We are clearly here not referring to anatomical similarities, save the difference between men and women, and the common facts of our social existence that we, as *humans*, possess: to wit, the use of language, ability to reproduce, living in societies, and so on. But we are alike in more fundamental respects. Our capacity to feel pain or to suffer, capacity to experience affection for others and to be able to bear relevant consequences of the same are capacities that have a moral resonance. As Bernard Williams (1962) highlights, these are *moral* capacities that are universal to humanity. However, there are other characteristics as well that we possess and these connect us to other humans in important ways. One of these would be a 'desire for self-respect', which helps us unravel our own goals without being instruments of others' will. In short, there is something common in our collective experience that forms the core of our egalitarian beliefs. This makes certain causes worthy of pursuit and helps realize the significance of some of our struggles against unequal relationships and social order. Along with other political values such as justice or liberty, equality offers us a moral framework that we draw upon to make political judgements, and explain, prescribe or criticize certain political views and forms of political action.

The concept of equality lies at the heart of normative political theory. In a very general sense, equality is a relationship between two or more persons or groups regarding some aspect of their lives. The idea of equality is not, however, a simple one and hence it is not always easy to speak with accuracy what that relationship ought to be and in respect of what. There is no one way in which we may define a relationship between two or more persons (or groups), determine the goals of the relationship, and give primacy to one aspect of it over another by attaching pre-eminent value to the same. There are multiple ways of doing so. In other words, the suggestion here is that the concept of equality can yield

various *conceptions* depending on how we unpack the building-blocks—relationships, persons, relevant attributes—and propose an appropriate relationship between them.

EVOLUTION OF THE CONCEPT

The history of political philosophy is replete with many references to the ideal of equality. Starting from the ancient Greek civilization till the 20th century, notable for its many egalitarian experiments, the idea of equality has evoked some of the strongest human passions. The content of the concept has undergone momentous transformations across centuries shaping, and being shaped by, the millions of people that have been inspired to fight various political battles sometimes against an autocrat, at other times against unjust social conditions, and on other occasions against undemocratic regimes or policies.

Tracing the history of an idea is fraught with difficulties, one of which is the problem of recovery of an interpretive exercise. Quite a lot has already been said on how we should go about interpreting texts and events, the focus of disagreement being on whether or not we can successfully employ contemporary lenses to judge contributions of past authors. Some say we can, and others claim this is impossible. Those who deny the possibility suggest that in order for interpretation to be authentic, it needs to be contextual, not textual. There are merits on both sides and many scholars are persuaded to adopt a pluralist approach, or at least concur to the validity of the same. The one further issue that remains, however, is that either the recovery of an idea can promise progressive revelation culminating in some contemporary set of ideals or it may very well be an account of degeneration concluding in a set of dangerous trends visible in contemporary times. The project of recovery, in other words, is laden with either hope or despair.

Most exercises of recovering the history of normative concepts in political theory aim at a progressive revival, noting in the process how ideas widen and deepen in scope. This is usually helped by drawing on the role that other ideas or values have also played in enriching the one under study. Thus, an account of the idea of equality cannot be separated from parallel accounts of liberty, justice, rights, popular sovereignty or democracy from which it feeds and is inspired by.

In what follows, we will selectively use some thinkers (Aristotle, Hobbes, Rousseau, Marx, and Tocqueville) who had decisive roles in giving shape to the idea of equality. If we consider the fact that the idea of equality also derives its strengths from similar normative concepts, we may well find other chapters in this book complementing the present exercise.

Alexis de Tocqueville, the author of the classic *Democracy in America*, writes that there is something irresistible and inevitable about the spread and progress of equality in the history of humankind. 'The gradual progress of equality is something fated', he declares. The main features of this progress, he claims, are its universality and permanence and the fact that the ideal 'is daily passing beyond human control, and every human and every man helps it along' (Tocqueville 1969: 12). How did something that is now 'universal' and 'permanent' begin its journey?

Aristotle

In what by now are well-known facts of the Greek experiments in popular rule, we are well aware of how citizens exercised an equal voice in the governance of their city-states. Aristotle's *Athenian Constitution* contains many references of egalitarian reforms initiated in Athens that prepared the passage for testing the democratic ideal. At the heart of the reforms were attempts that sought to reduce inequalities in many spheres of social life including, most importantly, the ending of aristocratic stranglehold over land, power and honour. Practices of equality established by law were a *sine qua non* of democratic rule. A word that competed in common usage with *demokratia* in ancient Athens was *isonomia*, meaning equality before and within the law, a form of political equality that secured the equal participation of 'the many' who were poor in the regime.

Yet, ancient Athens also had other classes of people who were excluded from the domain of citizenship: *metics* (foreigners), slaves and women. Aristotle's *Politics*, both documents and justifies this exclusion. Aristotle's conception of equality, it is evident, was limited to the class of citizens only. The political equality of citizens lay in acknowledging the virtue of 'ruling and being ruled in turn.' In Book III, Chapter 9 of *Politics*, Aristotle draws a straightforward correlation between justice and equality when he says that 'justice is held to be equality, and it is, but for equals and not for all; and inequality is held to be just and is indeed, but for unequals and not for all'. This is the first classic statement of *formal equality*, reiterating the dominant conception of legal equality of treating like cases alike, and unlike cases unlike. However, unlike other conceptions of formal equality which are generally shorn of substance, this conception captures Aristotle's defence of natural inequality among men to rule. Note that in Aristotle's view, nature, which does nothing in vain, divides people into the ruling and the ruled, where, to belong to the ruling category one must have rational, deliberative and authoritative capacities (true for some men, but not all). This inequality between the ruling and the ruled—the unequals—is just.

Hobbes

If Aristotle defends natural inequality and then proposes a corresponding political equality between some humans (usually male citizens), Hobbes, who quarrels with Aristotle the most, defends a view of the natural equality between all humans in the state of nature. In *Leviathan*, his most famous work, Hobbes claims that

> (n)ature hath made men so equal, in the faculties of body, and mind; so that though there be found one man sometimes manifestly stronger in body, or of quicker mind than another; yet when all is reckoned together, the difference between man, and man, is not so considerable, as that one man can thereupon claim to himself any benefit, to which another may not pretend, as well as he. (Hobbes 1968: 183)

As to the strength of the body, Hobbes proclaims that even the weakest has enough strength to kill the strongest either by secret plot or by conspiring with others. In addition, as to the faculties of the mind, Hobbes argues that prudence, borne out of experience, is equally bestowed upon men. What Hobbes proposes is the equal ability of individuals in the state of nature which gives rise to an equality of hope to achieve our ends. What drives individuals is an equal ability to work as well as an equal and irresistible passion for power. From this condition of equality, beset however by the passions of self-glorification and competition for more power, emerges the first threat to equality when men try to dominate and subjugate others. In this quest for more power, men forgo the need for security and live in a state of depravity. Unless men agree to cede a part of their power to the political authority and accept to lead a civilized but equal existence under the domination of authority, they can never be fully secure. In the Hobbesian vocation, it is important to acknowledge the achievement of natural equality among men freed from all non-political sources of authority, including the religious.

Rousseau on Inequality

In his *Discourse on the Origin and Foundations of Inequality* (also called the *Second Discourse*), Rousseau speculates on human psychology and the history of social institutions. This is where he delves deep into the issue of human inequality, describing its various types that exist among human beings and determining which kind of inequality are 'natural' and which ones are 'unnatural'. Rousseau presents his analysis of society and the origins of inequality as a historical narrative. The narrative is relatively simple but bears a powerful message. For Rousseau, man in his state of nature is essentially an animal like any other, driven by two key motivating principles: pity and self-preservation. In the state of nature, which is more a hypothetical idea man neither is a rational creature nor possesses the concept of good and evil, has few needs, and is essentially happy. The only thing that separates him from the beasts is some sense of unrealized perfectibility. This notion of perfectibility is what allows human beings to change with time, and according to Rousseau, it becomes important the moment an isolated human being is forced to adapt to his environment and allows himself to be shaped by it. When natural disasters force people to move from one place to another, make contact with other people, and form small groups or elementary societies, new needs are created, and men begin to move out of the state of nature towards something very different. Rousseau writes that as individuals have more contact with one another and small groups begin to form, the human mind develops language, which, in turn, contributes to the development of reason. Life in the collective state also precipitates the development of a new, negative motivating principle for human actions. Rousseau calls this principle *amour propre*, and it drives men to compare themselves to others. This drive towards comparison with others is not only rooted in the desire to preserve the self and pity others, but it also drives men to seek domination over their fellow human beings as a way of augmenting their own happiness.

Rousseau states that with the development of *amour propre* and more complex human societies, private property is invented, and the labour necessary for human survival is divided among different individuals to provide for the whole. This division of labour and the beginning of private property allow the property owners and all those who live off the labour of others to dominate and exploit the poor. Rousseau observes that the poor resent this state of affairs and will naturally seek war against the rich to end their unfair domination. In Rousseau's history, when the rich recognize this, they deceive the poor into joining a political society that claims to grant them the equality they seek. The universal consent of humanity is needed to justify the institution of private property. The rich suggest that everyone associate together to use their common force to 'secure the weak from oppression, restrain the ambitious, and secure for everyone the possession of what belongs to him'. The naive and unsuspecting poor 'ran to meet their chains thinking they secured their freedom, for although they had enough reason to feel the advantages of a political establishment, they did not have enough experience to foresee its dangers' (Rousseau 1964: 159–60). Instead of granting equality, however, the rich sanctify their oppression and make an unnatural moral inequality a permanent feature of civil society.

In the progress of inequality through the different epochs of civilization, Rousseau notes how the changing nature of institutionalized inequality transforms the dynamic of social relations. If the right to property and the establishment of law was the first stage, it authorized the status of rich and poor. The institution of magistracy was the second stage and it established the relations between the powerful and the weak. The last stage effected the transformation of legitimate power into arbitrary power (which we just discussed above) that authorized the existence of masters and slaves. In Rousseau's inequality-continuum, the property owners or the rich amass power and become masters. For the poor the metamorphosis would follow: poor→weak→slaves. That is a powerful statement but is soon followed up by Rousseau's claims that when no more inequality is possible and things have been stretched to their limits, 'new revolutions dissolve the government altogether or bring it closer to its legitimate institution' (Rousseau 1964: 172).

Rousseau's argument in the *Second Discourse* is that the only natural inequality among men is that which results from differences in physical strength, for this is the only sort of inequality that exists in the state of nature. As he explains, however, in modern societies the creation of laws and property has corrupted natural men and created new forms of inequality that are not in accordance with natural law. Rousseau calls these unjustifiable, unacceptable forms of inequality. It is, in other words, moral inequality, and he concludes by making clear that this sort of inequality must be contested. From this analysis and the prescribed prognosis of 'new revolutions', a straight road leads to the work of Karl Marx.

Marx

At one level, Marx's views on equality can best be described as a critique of liberal equality. In his polemic against the prevalent socialist conception of equality, Marx derided his contemporaries for their inability to account for the materialistic conception of history. It was

necessary for Marx to correct popular misconceptions surrounding the ideal whose uses were more in the interest of the bourgeois. In *The German Ideology*, Marx seeks to unravel the ideological bind that certain concepts have in a historical period. A ruling class has its own ideology to which society subscribes. The parallel between Rousseau and Marx here is pretty evident. As Rousseau laments how the poor get duped by the promises made by the rich to secure the consent of the former to institute 'legitimate' power, Marx also shows how the ruling class produces a legitimating ideology to perpetuate the system of economic exploitation. Towards that end, the division of labour in the ruling class of a capitalist society will ensure a division between mental and material labour, and correspondingly the division between the 'the thinkers of the class' and the capital owners will emerge. The former are 'the active, conceptive ideologists, who make the perfecting of the illusion of the class about itself their chief source of livelihood'. All historical epochs provide their own ruling ideas: 'during the time the aristocracy was dominant, the concepts honour, loyalty, etc., were dominant, during the dominance of the bourgeoisie, the concepts freedom, equality, etc.' (Marx 1978: 173). These concepts are abstract and hold sway by taking on the form of universality to which even some socialists sometimes fall prey. But they are hollow and bereft of substance unless accompanied by a communist vision.

What Marx envisions for the final stage of history—the communist, classless society—becomes clear only when we understand the impossibility of human emancipation under conditions of exploitative social relations. The question of human emancipation is linked to freedom from economic inequalities. The capitalist system intensifies and heightens economic inequality. In the transitional socialist stage, emancipation is not complete but equal access to the means of production is ensured. In this transitional stage many capitalist practices, including the necessity of labour and material incentives, do not vanish. The distributive principle in operation during the stage is guided by the principle of 'to each according to his work'. Socialism, in the transitional phase, realizes the ethical principle of liberalism. Here, man is seen only as a worker. In his *Critique of the Gotha Programme*, however, Marx declares that in the final phase of communism, society would be able to inscribe on its banner: 'From each according to his ability, to each according to his needs!' (Marx 1978: 521). Under communism, man will no longer be regarded simply as a producer but as a person with needs and desires, which, rather than his contribution of labour, will be the basis for the distribution of goods. The distribution of goods, properly understood, is the consequence of the distribution of the conditions of production. Scarcity and conflict of economic interests are contingent aspects of class societies. These will disappear with the inauguration of communist society.

Tocqueville

The central thrust of Tocqueville's work was to study equality as a tendency of modern history. His study of the American democratic revolution was designed to understand the historical transition from feudalism to democracy in the Western society as a whole. His study was not meant to just identify the transition, but to account for it as well. Why was

the triumph of equality inevitable? The project involved explaining the gradual and progressive development of social equality. Equality as an ideal appeals to people who wish to escape conditions of servitude and dependence. It makes democratic life possible. In comparing aristocracy with democracy, Tocqueville notes: 'Aristocracy links everybody,from peasant to king, in one long chain. Democracy breaks the chain and frees each link' (Tocqueville 1969: 508). In democracies, men prefer equality to liberty, and hold on to it tenaciously. 'The charms of equality are felt the whole time and are within the reach of all; the noblest spirits appreciate them, and the commonest minds exult in them. The passion generated by equality is therefore both strong and general' (Tocqueville 1969: 505). However, Tocqueville warns us of the dangers of excessive equality. There are times when the passions for equality may turn into a delirium. Tocqueville is equivocal about the consequences of social equality on political life. Although passions for equality may be found to exist very strongly in democracies, it is vital, in his view that a single-minded pursuit of equality at the expense of liberty may prove detrimental to the political health of democracies.

WHY EQUALIZE?

Reduction of inequalities may be considered as the primary objective of equality. But, why reduce inequalities? The objective of inequality-reduction can be inspired, for example, by a commitment to the ideal of uniformity. One way to bring about uniformity in an unequal world is to fix for everyone equal income irrespective of the individuals' abilities, or to design and distribute identical houses irrespective of the size of the family. This we know raises more problems than helps resolve. For instance, the idea of an equal income militates against what we deserve by way of differential talents, skills, occupations and efforts. No one can make a plausible argument that irrespective of our social positions we all deserve equal income. No one as well can make a convincing case that every family, whatever the size, gets to have a two- or three-room house. Or, for that matter, no one would ever argue that irrespective of performance in the examinations, every student should get the same grades.

Uniformity, in spite of some of its attractions, cannot be the end of equality, at least the way we understand and extend the latter in distributional terms. Equality must appeal to some other and better standards. However, a caveat is in order. Uniformity is a valuable standard when we speak of fair procedures. The idea here is that, rich or poor, high or low-ranking, each one of us is entitled to the uniformity of equal treatment, say, in the court of law, where our wealth or social rank should not affect the dispensation of justice. The usefulness of the yardstick of uniformity, however, ceases to have a moral significance in the distributional sphere.

Equality achieves certain ends and, by doing so, augments its moral appeal and its separate standing as an autonomous value. Equality is valuable for fulfilling four different ends to which it has an intrinsic connection. First, *equality is sometimes required in order to be fair*. If there are benefits or burdens to distribute, then, other things being equal, it is unfair to distribute them unequally. It is unfair, say, to award unequal marks or grades to two equally

talented students who have performed identically in their examinations. In the absence of good moral reasons for an unequal distribution, fairness requires equality.

Second, equality is desirable because *some measure of equality is necessary for self-respect*. People may belong to different positions in society but that should not reflect on how they perceive each other. When a person feels that in spite of the status differences that she shares with others she is as good as none, her self-respect is in danger. A fundamental way of understanding the need for self-respect is to acknowledge that the gap between a person's self-image and how others who are better off perceive that person is not too huge. Often, this calls for correcting unjust external conditions—by way of, for example, ensuring a minimally just material condition—that have a bearing on a person's self-image.

Third, equality enjoins *a duty to show respect to others*. The ability to possess self-respect is not the only thing that matters, but how one treats others. Showing equal respect implies recognizing that all people have capacities to deliberate for themselves and to engage in activities and relationships that are considered intrinsically valuable.

Finally, equality is necessary *to foster fraternity*. Conditions of equality induce some measure of solidarity among the inhabitants of a society by way of removing systematic barriers to social intercourse. Most commuters in buses and on trains do not worry about the caste or religious affiliation of their fellow passenger. Across caste and communal divide, people join hands to fight various forms of injustice. This is possible because we believe in the ideal of equality. Inequalities are objectionable in part because they place barriers to friendship, community and love.

All the above four justifications for equality are complementary to each other. Together, they capture different reasons for a general defence of equality and each separately highlights a special aspect as significant. The argument to be fair on grounds of distributive justice focuses on the *equal satisfaction of basic needs*. The argument from the perspective of self-respect makes a case for *equality of status* by requiring that material inequalities should not be glaring. The case for equal respect demands prerequisites of *equal opportunities for self-development*. Finally, the argument from the perspective of fraternity makes a case for *social equality* (Miller 1996).

EQUALITY OF WHAT?

In contemporary political philosophy, a lot of discussion surrounds the 'equality of what?' debate. Any attempt to apply the principle of equality between individuals must first come to terms with what exactly we must be concerned to equalize. In addition, the 'what' of equality has a distributional aspect to it; we are chiefly talking here about *distributional* equality. Although the final word on the debate on 'equality of what?' is yet to be said, scholars generally identify three metrics of equality: welfare, resources and capabilities. Besides the above, there is an alternative conception of equality that is less a competitor to distributional equality and more of a complement. This is the idea of complex equality. We shall examine each one of them below.

Equality of Welfare

Utilitarians generally argue that the project of distributional equality amounts to the distribution of welfare. 'Welfare' here is primarily understood in two ways. According to the classical utilitarian thinking, as espoused by Jeremy Bentham (also see Chapter 3), welfare refers to the happiness which is understood as the net balance of pleasure over pain that the individual experiences. According to this view, in assessing how well-off someone is in life, we should look at how happy he or she is, that is, at the net balance of pleasure over pain in his/her life. In more recent writings, however, welfare is identified with desire or preference-satisfaction; people have more or less welfare, and so have better or worse lives in a fundamental sense, depending on how far they satisfy their desires or their preferences. In deciding which preferences matter most to a person, the person must be able to form his/her own judgements independently and with full information without any scope for errors of reasoning.

A society that believes in distributing welfare equally will not worry much about how much resources individuals get, but whether or not these resources are instrumental in securing for each individual a level of satisfaction or happiness (whether in terms of pleasure or preference-fulfilment) equal to everyone else. Under such a scheme, it is imperative that we fulfil everyone's welfare equally irrespective of the inequality entailed in the distribution of resources. Someone who has a taste for an expensive car or jewellery is to be treated at par with someone who is happy riding a bicycle or owning a lantern. There is a moral issue here, however, that is bound to engage our intuitive notions of fairness. Should our society subsidize people's expensive tastes? Why should those who are unhappy without expensive cars have more of a claim on social resources than those who are content with bicycles? Or, for that matter, why should a society underwrite a gambler's professional risks and treat it at par with someone who needs much fewer resources to be trained as a car mechanic? Demands to treat preferences equally can at times be morally worrisome and unsustainable. The ideal of equality of welfare, let us be clear, certainly does not promote the cause of fairness, self-respect, or fraternity. In many ways, the ideal is considered morally objectionable by most liberals and is held to be unattractive as a yardstick for social policy.

Equality of Resources

The resourcist view of equality or 'resource egalitarianism' is most expressly identified with the views of John Rawls, Ronald Dworkin and Eric Rakowski. Equality of resources, Dworkin maintains, holds that a distributional scheme treats people as equals 'when it distributes or transfers so that no further transfer would leave their shares of the total resources more equal' (Dworkin 1981: 186). But one needs to know when precisely equality of resources is likely to be achieved. Dworkin suggests a two-stage process: (i) the ambition-sensitive auction, and (ii) the insurance scheme. But let us start with a simpler story, a story—much like a philosopher's fiction—that Dworkin himself uses.

Imagine we are shipwrecked immigrants washed ashore on a deserted island. Let us further assume for the moment (though we will qualify this later) that everyone has the same natural talents. Huddled together in an island with abundant resources and no native population, we set upon the task of equally dividing the available resources. We elect one amongst us to effect an equal division of resources. The division will follow the auction procedure. In view of the fact that our goals in life may differ, we need to exercise our choices on which resources we need and hence bid for. To that extent, we are each given 100 clamshells to bid for all the available resources in the island that are up for sale in a perfectly competitive market. Each one of us is likely to have different preferences and our preferences will determine on what we wish to spend our clamshells. Someone who wishes to engage in farming will spend a major part of the clamshells on agricultural land, and those others who wish to spend time near the sea will bid for the beaches. And a person who wishes to set up a dairy farm will bid for cattle and some grazing land. In this manner, each one will bid for different resources in accordance with one's ambitions and each will end up with a bundle of resources that he or she would not wish to trade away with someone else's. The division, so effected by the purchase of a different but equal bundle of resources in the auction, meets the *envy test*, which implies that 'no division of resources is an equal division if, once the division is complete, any immigrant would prefer someone else's bundle of resources to his own bundle' (Dworkin 1981: 285). We could say that if the envy test is met, then people have been treated with equal consideration, and differences between them owing to different bundles of resources are a reflection of their different ambitions.

We have just met the requirement of choice in the resource egalitarian conception. However, in the real world it is difficult to imagine that everyone would be similarly endowed in natural assets. We are re-opening an issue that we had assumed to be non-existent earlier. Will the envy test succeed if we assumed that people were differently endowed? Suppose some of us are physically challenged and are born with natural handicaps, say, without eyesight. Now, in the auction scheme where all of us enjoy equal ability to bid for equal bundles of resources, no two persons with different natural endowments will find themselves under conditions of equal circumstances. A person who is physically challenged, for instance, will have special needs and the resources that she purchases with her 100 clamshells will leave her less well-off than others. She shares the burden of unequal circumstances. Where the more fortunate than her make more meaningful choices with their resources, a disproportionate amount of her resources will be spent in meeting her special needs. This is not fair considering that her handicap was involuntarily acquired. How do we then meet the envy test?

One way out would be to compensate for her natural disadvantage from the common pool of resources before we start the auction process. In order to be fair to her we may be required to design a distributional plan that offsets her brute luck before giving her a fair go at the auction. The plan is simple: we need to be *both* endowment-insensitive and ambition-sensitive. This is another way of acknowledging, as Dworkin suggests, that people's fates in any distributional scheme is as much determined by their choices as by their circumstances. Hence, although the auction takes care of people's choices, compensating people—or, better

still, securing insurance for them against brute luck—is morally required. However, the matter is not as simple as it mayfirst seem. One cannot simply concede that we compensate all natural disadvantages of the unlucky. Some disadvantages cannot just be compensated, and some need not be a cause of great concern. And in cases where compensation is due we can only partially equalize unequal circumstances—not wholly—no matter how much we compensate. We need to strike a balance somewhere between being fair to people's choices and taking moral responsibility for their disadvantages. An ambition-sensitive auction needs to be balanced by an *insurance* scheme that takes care of natural, undeserved inequalities. Before the auction can take place, all of us may be required to put aside, say, 25 or 30 clam-shells to meet the obligations towards the disadvantaged and then bid for the available resources. A central objective of Dworkin's proposal is to invite us to see the parallels between what we commit ourselves to in an ideal setting, and what the transposed implications are to the non-ideal, real world. A rough parallel of the insurance scheme in the real world is the practice of progressive taxation. Taxing the rich proportionately more than the poor enables the state to secure welfare for the disadvantaged. A resourcist conception of equality lays emphasis on the centrality of state responsibility towards remedying unequal circumstances among people.

Equality of Capabilities

The economist Amartya Sen pioneers the idea that distributional equality should concern itself with equalizing people's capabilities, instead of emphasizing on resources or incomes. We should be able to, Sen argues, focus on the real freedoms that people enjoy such as being able to read, being healthy, having self-respect, being politically active, being able to take part in the life of the community, and so on. The proper focus should be on what people are able to be and do, that is on their functions, and not on how much resource is allocated to them. Resources only secure for us what makes us happy, lead valuable lives, and are therefore, to be considered as means of well-being.

In contrast to the resource approach, Sen proposes the notion of well-being understood in terms of *function*. Reading is a function vital to leading a valuable life. However, Sen does not argue that social policy should be concerned with function. Social policy, according to Sen, should instead focus on *capabilities*. A capability is the ability to achieve a certain sort of function. For example, literacy is a capability, while reading is a function. In a society where people are illiterate, a state should actively promote people's ability to read, i.e. literacy. Whereas a resource egalitarian may insist that resources such as books and educational services may be provided for in regions that are deficient in literacy, the capability advocate would argue that more than a provision of external means what matters is the capability—an internal ability—of the target population to read and write. This way of addressing the problem of inequality is indeed a novel one.

The novelty of the capability approach is further brought home by Sen's observation that a proper analysis of inequality needs to go hand-in-hand with facts of human diversity. We are, Sen argues, 'deeply diverse in our internal characteristics (such as age, gender,

general abilities, particular talents, proneness to illnesses and so on) as well as in external circumstances (such as ownership of assets, social backgrounds, environmental predicaments, and so on).' (Sen 1993: xi) To take one example of an internal characteristic (gender) made worse in the presence of some adverse external factors (discrimination and patriarchal institutions), Sen points to the mortality differential between males and females (that also accounts for the phenomenon of 'missing women' in countries such as China and India), especially among rural families in Asia and Africa (Sen 1993: 122–25). If other social characteristics such as identity and social disadvantage are factored in, our understanding of inequality deepens. Hence, it will be plausible to maintain, for instance, that beyond the simplistic account of gender inequality, most Dalit women are worse off than other women in terms of high mortality. However, the buck may not stop here. It will be a real test to determine further whether Dalit women of Delhi, for example, fare as badly as, say, widows from upper-caste rural Rajasthan. Some would argue, and with good reasons, that the latter—due to rigid external constraints—are probably worse off than the former. We need to be sensitive to such differences and not be misled by appearances. Since many characteristics can impinge on people's functioning, it is essential that policy makers amass as much information as possible before they design suitable policies to equalize people's capabilities. Social policy must be attuned to facts of human diversity. A simple minded approach (for example, of equalizing incomes) towards correcting complex modes of inequality will simply not do.

Complex Equality

Michael Walzer gives currency to the idea of complex equality. Walzer is an egalitarian but finds himself ill at ease with the intellectual enterprise involved in identifying the single most important metric of equality—welfare, resources or capability. This enterprise, to him, is somewhat misplaced. It is misplaced due to the egalitarians' unrelenting insistence on a single point of access to the *plurality* of distributive arrangements. This needs unpacking. Often, in our quest to distribute goods, we harp more on the principles of distribution and less on what meaning we attribute to goods. Walzer argues that people conceive of and create goods, which they then distribute among themselves. It is important that we shift our attention from distribution to the conception and creation of goods. We give meanings to goods, which determines their social value. The same goods have different meanings in different societies. There is no single set of basic goods which could be universally conceived of and given the same value. Rawls, Walzer would argue, was off the mark when he suggested that what mattered was how a set of primary goods needed to be fairly distributed across societies. If one knew how goods were socially created, one would have difficulty agreeing with Rawls in giving a universalist account of justice that would apply across time and space. 'All distributions are just and unjust relative to the social meanings of goods at stake' (Walzer 1983: 9). These meanings change across time and space. For instance, the idea that childcare is solely a family responsibility no longer holds true in some societies unlike

in others. Every society will give value to goods in a particular way, and will be sustained by a shared understanding among members.

What, however, is typical to the understanding of how goods ought to be distributed is that when meanings given to goods are distinct, distributions must be autonomous. Every set of goods constitutes a distinct distributive sphere within which only certain criteria of distribution are appropriate (Walzer 1983: 10). Economists may be right to impute a certain measure of rationality and acquisitiveness to the behaviour of people in the markets. However, the same does not hold true in all social domains. Fathers and mothers are supposed to be loving, trusting, caring and altruistic. Citizens are supposed to be equal, impartial, and motivated by views of the collective good. Resources within families are not distributed as wages; political offices in a democracy ought not to be distributed among relatives. Walzer maintains that there is no reason to expect that the same distributive standards must prevail in different 'spheres' of social life. Thus, the spheres of the market and political power, to take two examples, are distinct and separate. The norms for distributing goods within each are internal to each and ideally should not spill over. Critics, however, may reason that this is easier said than done. Of course, inequalities from economic life do spill over into political life and vice versa. Wealth can buy votes, and elected representatives can misuse their offices to further the interests of business. This, Walzer would be quick to point out, is highly undesirable. Nations do indeed erect barriers, with limited success, to restrict the extent to which wealth leads to political power.

Within each sphere, there might well be inequalities and there is nothing wrong with that. If the distributional norm in the economic domain lays emphasis on effort and because of which inequalities emerge between those who work hard and those who do not, the indolent or the lazy cannot expect to be similarly rewarded as the diligent. This inequality is acceptable with the caveat that hard work at times goes unrewarded in some societies. What is not acceptable, however, is when people who enjoy a certain pre-eminence in other spheres are disproportionately rewarded in the economic sphere. A case in point could well be to ask whether reward for work should be related to religious affiliation. In Walzer's scheme, it is clear it cannot be. But, what if it does? That would lead to *tyranny*. Tyranny is the disregard for the distinctness of spheres and the principles internal to them and in ways in which it multiplies inequalities. Some groups can monopolize a particular category of goods and then use their monopoly to achieve unequal distribution of other goods. That would lead to *dominance*. Our effort should be on the reduction of dominance. Equality requires a diversity of distributive criteria that mirrors the diversity of social goods.

Complex equality is the opposite of tyranny. 'It establishes a set of relationships such that domination is impossible. In formal terms, complex equality means that no citizen's standing in one sphere or with regard to one social good can be undercut by his standing in some other sphere, with regard to some other good' (Walzer 1983: 19). The idea of complex equality is a refreshingly different perspective than those struggling over the metrics of equality. In contrast to the abstractions of individual responsibility and personhood that characterizes the three conceptions we discussed above, Walzer's approach focuses attention on the social meanings of goods and the plurality of the spheres of justice.

IN CONCLUSION: THE POLITICS OF EQUALITY

The politics of egalitarianism in the 20th century was instrumental in justifying the idea of a welfare state, among other things. That idea, successful in its heyday, has declined over the past two decades. What went wrong? We cannot detail all the causes, but a short checklist may help. Many democratic societies today are witnessing the rise of right-wing politics. This trend started in the 1980s when governments headed by Ronald Reagan and Margaret Thatcher unleashed a backlash against the welfare state. The legitimacy of the welfare state was called into question and it was largely discredited for having given short shrift to individual responsibility, creativity and economic efficiency. Right-wing politics in recent times is sustained by citizens who wish to pay less tax and consequently vote to power parties (usually right-wing) who promise less tax. In the global political landscape, moreover, one notices a decisive ideological shift toward the right. The politics of globalization has further caused a setback to the practice of redistribution and the idea of welfare-state policies.

Yet another distinct political phenomenon is also visible: the political struggles of identity groups. This parallels new concerns in normative political theory, too. The 'equality of what?' debate is being replaced by 'equality of whom?'. Egalitarians are increasingly shedding their individualist bias and are keener to engage in concerns surrounding inequality between groups that owe more to non-material factors. The struggles for greater equality by women, minorities, Dalits, linguistic groups and others are a pointer to the continuing relevance of the bases of social equality and a corresponding search for new paradigms of group-sensitive equality.

Points for Discussion

1. In drawing up a will between five children with different tastes and ambitions, how would a parent divide the inhertitance among them? The following information is provided about the children:

   One is blind.
   One does not wish to work and has expensive tastes.
   One is a prospective politician with expensive ambitions.
   One is a teacher with humble needs.
   One is a fashion designer who works with expensive material.

2. As a representative of your class, you have been invited by the college Governing Council to discuss policy issues related to

   (a) The translation of the most popular English textbooks to your native language
   (b) The expansion of Braille resources in the college library for visually challenged students
   (c) The provision of wheelchair access to the entire college premises

   Would you justify any of these policies? Why and how?