

Introduction to Political Theory
Dr. Mithilesh Kumar Jha
Department of Humanities and Social Sciences
Indian Institute of Technology, Guwahati

Lecture - 06
Equality - I: Introduction; Equity and Egalitarianism

Hello, friends. In this lecture, we are going to start a new topic as mentioned in the syllabus, that is, equality. We are going to have three lectures on equality. And today, we are going to focus basically, on the introductory part of equality, where we are going to discuss different forms of it. In the second part of today's lecture, we will be focussing on equity and egalitarianism, and how, it is connected to the idea of equality. And in the next lecture as well, we will begin with the idea of equity and egalitarianism and also, discuss equality of opportunity.

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Intro

- The concept of 'Equality' is a fundamental concept in normative political theory. However, it is also one of the most complex and 'essentially contested' concept and therefore it is very difficult to define precisely what equality is? Equality as a political concept implies that people with similar attributes should be treated equally. However, there are many conceptions of equality.
- The two important aspects of Equality is – First, equality of what? Is it equality of Income, or well being, or the capabilities; Second, How we can reconcile the principles of equality with other political values such as liberty, justice, and efficiency.
- According to Alexis de Tocqueville in democracies men prefers equality to liberty. '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'. Thus, while acknowledging the power of equality to generated passions among the groups and communities, Tocqueville warns us about the danger of excessive reliance on equality and wanted to maintain a balance between equality and freedom. Which we will discuss in one of the lectures on equality in some detail.
- It is true that as an ideal equality is not only desirable but it has a powerful resonance among the 'people who wish to escape conditions of servitude and dependence'. And thus, as an ideal equality is always gradual and progressive. It can not be achieved at one go. And absolute equality is neither desirable and nor possible to achieve. And therefore, there is the ideals of equity and egalitarianism which we will discuss in the second part of this lecture.

The concept of equality in the political discourse is of central importance. And this concept is there from the very beginning, when human-beings began to organise their collective lives. It can be argued that depending upon the nature of their community, and in terms of size or scale, the idea of equality underwent a number of changes. So, in the earlier times, the community was smaller with having small number of people based on caste or kinship relationship, and the practices of equality within that caste was very different. It was related to other communities based on kinship or other community ties.

In the modern times, when the scale or size of community has grown enormously, people from different groups, castes, ethnicities or other social, cultural and economic backgrounds, ensure that they all are to be treated equally. However, it is a kind of challenging task. And thereby, we see in modern times, the discussion on equality in the formal, legal and political sense, which are by and large universally, accepted.

In every modern nation-state, all the members of that nation-state are treated in the formal sense or legal sense, equally. And this treatment of each member equally is not contested. It is only in the substantive sense when we actually, try to examine how individuals in a particular nation are actually, treated in their day to day life. Questions like what are the conditions of their existence and whether those conditions of existence prevent them from being treated equally, at par with other members of the community is something, which makes this realisation of equality, a problematic thing. Many scholars and thinkers have thus, argued about how to move beyond the formal, or legal notion of equality, to a more substantive notion of equality, or to make this equality more realisable for every individual or every members in the society.

The other part of this question is why do we need equality? Is there any connection or relationship between equality as a political ideal and other political ideals such as justice, liberty, or efficiency? So, these are some of the aspects that are related to equality, which we are going to discuss over the course of these three lectures on equality.

The concept of equality is a fundamental concept in the normative political theory. In the introductory lecture, we have discussed about different characteristics and natures of political theory. One of the significant aspects of political theory is its normative nature. And because, it is normative in nature, it is subjected to multiple interpretations and often, at times, contradictory interpretations. Because the values, norms, that is, at the base of any kind of interpretation or understanding of a political concept differs from people to people, and society to society. Therefore, it applies equally to the concept equality that we are going to discuss today.

Although, it is very fundamental in the modern social and political organisation, the concept of equality is of paramount importance. In the sense, that all communities and every single member of that community wants to be treated equally. And if, they are treated unequally or there is some differential treatment or partial treatment, there are lot

of tensions in different societies. In our own society, Dalits or excluded marginalised communities are demanding their rights like, queer rights or women rights in different societies or human rights, or animal rights, etc. So, all these courses are a reflection of the aspirations among different groups and members of a particular group towards equal treatment. And this idea of equal treatment makes the aspiration for an equal treatment, and thus, makes this concept very central to the whole normative political theory in political science.

However, this centrality or fundamental nature of this concept is also, one of the most complex concepts. As we proceed in this lecture, we will come to know, how and why this concept is so complex in nature. It is one of the most complex and also, an essentially, contested concept. The essentially, contested concept means, there are different theorizations, understandings or interpretations of this concept as argued by many thinkers. And these are not just different only in degree, at times, but it also, appeared to be contradictory to each other which cannot be reconciled.

So, the nature of this concept is then essentially, contested. Whether equality is desirable or not, do we compromise liberty for equality. These are some of the debates, which make this concept essentially, contested in nature. This complex or essentially, contested nature of equality makes any attempt to define it precisely, what equality is.

And if, we agree, to have equality, what kind of equality and equality of what it means? These are some of the questions which are not easy to have any singular or precise definition of it. So, it is very difficult to define precisely, what equality is. Equality as a political concept, however, implies that people with similar attributes should be treated equally. Thus, it is a very fundamental maxim in political discourse, which is based on the very idea that equality implies, everyone should be treated equally but that may not be necessarily, a just or fair principle to have.

If a society, which is unequal or fundamentally unequal in nature, or different sections in the society, requires different needs, then in that condition, if we have laws or if we treat all of them equally, then the outcome will not be equal. So, the fundamental premise of equality is to treat everyone equally, who are having similar attributes. But, if the society is hierarchical or graded or there are different sections, and unequal in attributes or resources or in conditions, then it is the responsibility of the state, to ensure that every

section, group or single individual should have equal opportunity, to develop his or her own faculty.

The fundamental premise of equality is to treat everyone equally, with similar attributes. However, how to treat them, should there be the equality of welfare or equality of resources, or equality of capabilities, that is something, we will discuss later in this chapter. So, even we agreed at that all individuals having similar attributes should be treated equally, the issue is again how, those treatments should be made. It is thus, something which is very complex or a contested terrain to look at (Refer Time: 09:40).

There are two aspects of equality. They are- first, equality of what? Is it equality of income or well-being or capabilities? The second aspect of the concept of equality is how, we can reconcile the principles of equality with other political values, such as liberty, justice, and efficiency. We will have one lecture, where we are going to discuss this connection between equality and liberty. So, these two aspects of equality emphasize on questions like what equality rest on whether it is in terms of income, well being, and capabilities. Thus, there is a distributional aspect of equality and so it wants the distribution of something, among some people.

Now, this distributional aspect of equality requires decision about what this distribution is all about? Is it about income or is it about well being or capabilities? And all these three things are very different from each other. The other aspect is about reconciling the demand of equality on the one hand, and other political values, such as liberty, justice, efficiency, on the other.

However, Alexis de Tocqueville, writes, in democracies man prefers equality to liberty. So, in democracy that is based on the idea that all members have the equal right to participate in the decision making process that affect their collective lives or an individual life. This equal and free membership or participation in the public life, or the collective life or in collective decision making is something that defines democracies. Therefore, the idea of equal treatment of every member of the community equally is a very central premise of any democracy.

Tocqueville, again, argues that in democracy, people tend to prefer equality over liberty. However, he warns about the danger also. He writes, the charms of equality are felt the whole time, and are within the reach of all. So, no longer, the equality is something,

which is the privilege of few or the selected few, who are of certain literary or educational qualification or with some assets or property.

Thus, equality is something, which is within the reach of every member of the community without any difference on the basis of their social, cultural, and economic backgrounds. So, 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 excelled in themselves. So, once, the idea of equality as an organising principle is followed for a collective life or a collective social and political life, it is unfolding and it is hard to withdraw that means. Thus, the new sections, groups who are earlier excluded or marginalised will demand more and more, equal share, and more and more equal participation.

The noblest spirit will appreciate it, but also, the commonest people will regard its value and will fight for it. The passion generated by equality is therefore, both strong and generous. That is, what makes Tocqueville, argued that equality prefers to liberty in a democracy. Thus, while acknowledging, the power of equality to generate passions among the groups and communities, Tocqueville, also, warned us about the danger of this excessive reliance on equality. And he argued that there is a need to maintain some kind of balance between equality and liberty. So, about this balance and how to, reconcile these two political values of equality and liberty, we will discuss in the last lecture.

It is true, that as an ideal, equality is not only desirable, but it has a powerful resonance among the people, who wish to escape the conditions of servitude and dependence. Thus, what makes the ideal of equality not just desirable, but is a rallying point for various communities and groups in the society is this urge or aspiration, to escape from their existing conditions of servitude and dependence.

If a society is hierarchical, the consciousness or the imagination of the groups who lived in the conditions of servitude or marginalisation, no longer wants to live that life again. And when, they demand equality, it leads to a kind of social transformation to create a more inclusive or an egalitarian society. So, this aspect of equality, which transforms a hierarchical society into a more egalitarian and just society is something, that is, of paramount interest in any public discourse.

Therefore, even, when the parties or leaders or the ideologues, refers about the content of what this equality is, they all will agree to the desirability of this concept of equality in modern democracies, especially, among the people or groups who have experienced marginalisation or exclusion, such as, in the case of women or sexual minorities or religious minorities or Dalits, and blacks or minorities of various kinds.

So, for them, the treatment of equality is fundamental for their existence or to have a sense of self-respect for their own being, an equally respecting worth of the other individual. Equality, therefore, is of central importance in modern democracy. However, an ideal equality is always gradual and progressive. Here, we need to make a difference between the idea of equality which is progressive or gradual, that means, once the inclusive or the egalitarian process of making a society becomes more just or social, or it just starts, then it takes time, to make it perfectly, a just society.

In other words, there is no possibility, of having absolute equality. That means, equality is not synonymous with uniformity, means all members in the society should have same level of equal or same kind of households which have same concepts, and of what is good life, etc. So, this idea of absolute equality is not only, just desirable, but also, it may be detrimental to the pluralists or the diversity, which defines the individual and the collective life. It is also, desirable.

Equality is not something, which obliterates diversity and differences. It is more about creating the conditions and opportunities through which individuals, no matter, what his or her background is should be able to develop himself or herself to the maximum. So, to realise that worth, or self-worth which should be not just for the individual to think or imagine, but also, for others to respect that worth or moral worth of individuals, despite of, the differences exists in the social, economic, or in political science.

The equality tries to treat everyone equally, without making a difference, and also, without having a kind of uniformity. The ideal for equality is not uniformity. Now, this is something, which can be achieved gradually, in a progressive manner. One step to the next, and so on. And therefore, as society moves from a small countable number of members to a large society, which is of billion populations or millions of populations, and the members of which will never meet each other in their life time or interact with each other face-to-face.

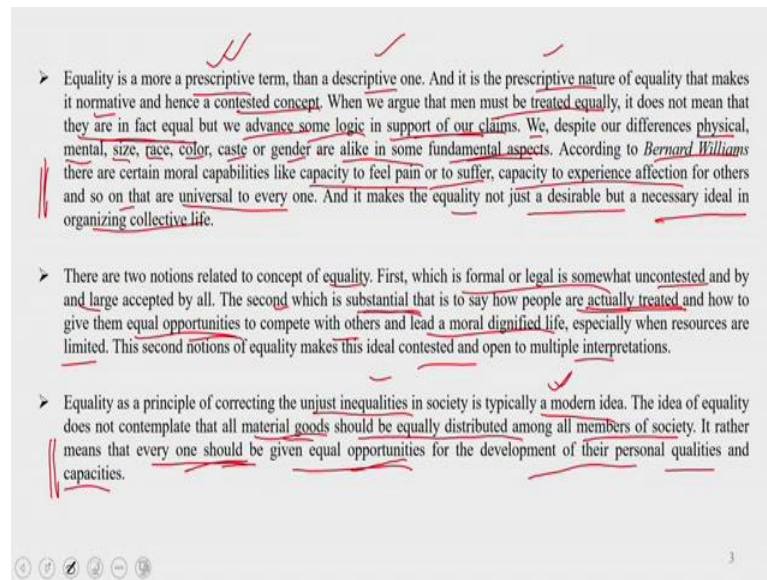
And yet all of them, realise that they are members of the same community, and thereby, carrying same level of rights. They require equal treatment by the state or by other members of that community. So, this realization is possible, in a gradual progressive manner. It cannot be done through one shot or in at one go. So, people gradually, realise their rights to be treated equally. This is a kind of continuum, where one group is after the other and they realise that equality is significant for their moral, political, social, and economic progress.

Let me give you one example. For a very long time, it is only, the men who were regarded as having certain natural and inalienable rights. Now, for the women, to get same kind of rights, they had to fight for a very long time. Similarly, those who are blacks or from racial minorities had to fight, again for a very long time, to get treated as equals in their society, to be accepted by their society as one and same member.

Equality in a sense is rational, when we treat all individuals as humans. So, they must be treated equally. If, we accept equality formally, in the real practical sense that is, to treat everyone equally, despite of, their social, cultural, racial, economic backgrounds, then it is something, which is not to be achieved at one go. It requires a continuous process and people, communities increasingly; recognise this necessity and they make demands for their right to equality to the society, polity, and state.

The most recent examples, in this continuum of making more and more rights, claims, and about getting treated equally, at par with other members of society are examples like, the queer, bisexual, and homosexuals demanding rights. Their demand of being treated equally, is a kind of reminder or reflection of the fact that equality is a principle or an ideal is something, which is always gradual and progressive. So, even if, law treats or defines everyone must be treated equally, the actual practices of equal treatment requires a lot of time. Thus, it is called a progressive movement. It cannot be achieved at one go, and absolute equality, is neither desirable nor possible to achieve. And therefore, there is the ideal of equity and egalitarianism, which we will discuss in the second part of this lecture.

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Again, equality is a more prescriptive term. Prescriptive term means that it has certain values and logic, while it claims to treat everyone equally. So, it is not descriptive. However, it can be used as a descriptive term, also. It believes, everyone is of same moral worth or everyone is with same degree, or same weight or same height or same age or sex, and thereby, equality can be taken as understood in a descriptive sense. But we are more concerned about equality as a prescriptive term, where it is loaded with certain normative concerns. It is thus, the prescriptive nature of equality that makes it normative. Hence, it is a contested concept as we have discussed.

When we argue, man must be treated equally; it does not mean that they are in fact equal. So, this claim of treating everyone or man should be treated equally, does not automatically, imply that men are in fact equal. But we want that despite of differences man must be treated equally, must carry certain normative or logical assumptions, and those assumptions makes this whole conception of equality a contested concept. So, to support this claim, we must advance some logic or some normative justifications.

So, we despite our differences, may be physical, cognitive which is mental, or size, race, colour, caste or gender, despite of, these visible or explicit differences, they are considered to be alike in some fundamental aspects. Despite of such differences, we all are considered or regarded alike in certain fundamental aspects. According to Bernard Williams, there are certain moral capabilities like capacity to feel pain or to suffer,

capacity to experience affection for others are universal to everyone.

The capacity or the cognitive exercise to have self-worth, to feel pain, to respect others, to get respected by others is something, which is not the exclusive right of few, but it is available universally, to everyone. Thus, society or state recognises this universal aspect of individuals, despite of, their visible differences on the basis of caste, class, race, gender, sex, and so on. That is something, which we need to take into account.

It makes equality not just a desirable, but a necessary, ideal in organising collective life, especially, the modern political life which is based on this assumption of equality. The pre-modern societies had a moral order in which the hierarchy was based on divine right of the king or in the cosmos. Therefore, the social hierarchy was justified. Moreover, the arguments like how a society can treat those equally, whom God has created unequally, is often heard. That kind of logical or normative premise of pre-modern era is however, no longer valid in modern times.

The modern, model order is based on the fundamental premise that everyone is a human, therefore, rational and so, they must be treated equally. So, equality is the very premise of organising a modern, social life. The idea of nation-state or being the member of a nation-state gives you certain rights and those rights are recognised by the state.

For example in India, we have fundamental rights which are available to all the members, who are part of this nation and call them as Indians. Despite of, their social, economic, cultural, racial, or religious backgrounds, they are given those fundamental rights that does not discriminate them on the basis of their caste, class, gender, and so on. Atleast, in the theoretical or moral sense, the premise of equality is widely and universally accepted. That means, there is no contestation to it. Now, how to ensure, these equalities are not just there in the formal or legal sense, but actually, people should be able to live a free and equal life. There, the conception or its understanding differs, that is, about welfare which we will discuss in a moment.

There are two notions related to the concept of equality. First, which is formal or legal as somewhat, uncontested as I have been arguing and by and large, accepted by all. So, formal and legal equality is something, which is uncontested, and by and large everyone accept it. The second is substantial. That is, how people are actually, treated and how, to give them equal opportunities, to compete with others and lead a moral dignified life,

especially, when the resources are limited. This second notion of equality is the substantial notion of equality which makes this ideal of equality, contested and open to multiple interpretations, which we will discuss in a few minute.

So, equality, as a principle of correcting the unjust inequalities in society is typically, a modern idea. In pre-modern times, the inequalities and hierarchies were considered as given natural, as reflection of the inequality in the cosmos. But in modern times, equality is a principle to correct unjust inequalities, something, which is very transforming. Thus, the idea of equality does not contemplate that all material goods should be equally, distributed among all members of society. It rather, means that everyone should be given equal opportunity for the development of their personal qualities and capacities.

Whether equality is about equality of resources or equality of opportunity, or it is not just about equality of resources or equality of opportunity, but also, it is about creating the conditions, which enhances the capability of individual, then he or she can develop himself or herself, the way he or she likes to be developed. So, these are some of the contentious issues which are related to the idea of equality.

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Why Equality?

- In normative political philosophy equality is used in two ways: one, foundational equality seeks to establish equality of all human beings in the moral sense. It asserts that people are equal by virtue of their rationality. And, it is also argued that a shared human characteristics is politically more significant than other apparent differences. Second, distributive equality believes that society should treat its members equally because all human beings are equal in their moral worth and deserve same or equal opportunity for their development. ✓
- Equality is required for
 - a. equal satisfaction of basic needs
 - b. equality of status
 - c. equal opportunity for self development
 - d. developing fraternity and social cohesiveness

Now, question arises, why equality is important? In the normative political philosophy, equality is used in two ways. One is foundational equality, which seeks to establish equality of all human-beings in a moral sense. It asserts that people are equal by virtue of their rationality and it is also, argued that shared human characteristic is politically, more

significant than the apparent differences. So, whatever be the differences in terms of social, cultural, or racial backgrounds of the individuals, the shared human characteristics is politically, more profound than the visible apparent differences.

The second view of arguing about equality is the idea of distributional equality which believes that society should treat its member equally, because all human-beings are equal in their moral worth, and deserves same or equal opportunity for their development. So, there is the kind of distributional aspect of equality, besides, the foundational equality.

Now, why do we need equality? Basically, we need equality for the following reasons. First, to have equal satisfaction of basic needs. So, there are certain primary goods or certain basic needs which is required by everyone, like right to food, right to health care, right to long or a healthy life.

So, there cannot be a universal definition of what those basic needs are. Because it is subject to change depending upon the society or the context, or the historical age in terms of technological and other advancements. Again, what is regarded luxury, today, may not be regarded as luxury tomorrow or in the future. Perhaps, it may be regarded as the basic needs, but nonetheless, whether those basic needs are made available to everyone in the society or not. So, we need equality to ensure that basic needs of everyone are equally satisfied.

The second, we need equality to ensure that every member of the communities have the same status. There should be no difference between high and low, highborn or lowborn, one section of society or other section of society, male or female etc. So, we need equality to ensure that all the members are part of the same species, that is, humanity. Therefore, it is rational. We must have the same status. Thus, we need equality to ensure that everyone has the same status as well.

The third is equal opportunity for self-development. So, the opportunity is something, which we may take for granted, but it is, absolutely necessary, for individual to develop or to the full development of his or her potentialities. Many individuals or groups in the society were denied opportunity to develop themselves, or to their full development, or to develop their skill, or capabilities. Therefore, we need equality to ensure that every member or the groups in society should have equal opportunity for their self-development or progress.

Finally, we need equality, to ensure or to develop fraternity, that is, the social cohesiveness. So, a society, especially, which transcend the limits of kinship, blood ties or direct face-to-face relationship, the large heterogeneous, diverse, plural society requires equality, to develop a sense of solidarity and fraternity among the members.

So, a nation-state, you take the examples of patriotism or less patriotic, national or anti-national. Such debates are also, a reflection of the looseness or somewhat inbuilt cracks in the social solidarity, and social fraternity of a society. To make the society, more cohesive, to develop strong bonding in the psychological or in the emotional sense, to develop that we need equality or to build a society, which will be more cohesive and strong with where every member has a sense of free and equal membership in the society and should have equal worth, that is, respected not just by their own assessments of self, but by others in the society as well. Thus, we need equality for all these various reasons.

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Dimensions of Equality

Legal or formal equality

➤ The principle of equality was first put forward as the demand for legal equality, that is, grant of equal legal status to all the member of a political community irrespective of their birth, physical and mental capacities, or other differences.

➤ Legal equality implies equality before law and equal protection of laws available to every citizen in the state.

Political equality

➤ Political equality denotes the equal political rights of the citizens. It refers to the right to be represented in the decision-making bodies on an equal footing, i.e. on the principle of 'one man, one vote, one value'. It also postulates that nobody will be barred from holding political office on grounds of birth, religion, sex and so on.

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Now, the dimension of equality, one is the legal or formal equality. The principle of equality was first put forward as the demand for legal equality which we know, by rule of law does not discriminate between or among individuals. So, it grants equal, legal status to all members of a political community, irrespective, of their birth, physical or mental capacities or other differences. Thus, legal equality implies equality before law or equal protection of law. This legal or formal equality talks about treating everyone equally, without discriminating on the basis of their birth or their physical or mental

capacity.

The second is political equality which is mostly, expressed in the idea of one man, one vote, or one vote, one value. So, this organising idea of modern political life in a democracy focus on to participate not just in electing new representatives, but also, getting oneself elected for having an electoral position or position of a representative. These are not denied to any member of the society because of their place of birth or on physical basis or such capacities, or if they have property or not.

So, we are not discriminated against on the basis of the place of birth, race, caste, or gender, from fighting elections for the representative post and in electing our representatives. The political equality, is thus, about giving everyone equal participation in the political life of that community. In terms, of electing their representatives and also, themselves getting elected for the political or representative positions.

Now, these are not denied to an individual, only on the grounds of their birth, caste, religion, or gender, etc. Thus, it refers to the idea of one man, one vote, or one vote, one value. So, no matter, what education, property, or status of the individuals in society or in the economy, when he or she votes, the value of that vote is one and same, whether it is the prime minister or the rickshaw puller, whether it is the professor or a student, or a male or a female, or a Hindu or a Muslim or a Christian, etc. Thus, the political equality is a kind of equaliser which requires everyone to participate in the public life of the community as a free and equal member.

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Socio-economic equality

- The achievement of formal legal and political equality is followed by the demands for more and more socio-economic equality. In other words, equality of conditions.
- Socio-economic equality requires the reduction in inequalities. Now what is regarded as inequalities is something that is determined by the prevalent concept of social justice. And, it differs from age to age and society to society. Socio-economic equality insists on a progressive extension of social benefits to the weaker, excluded, marginalized and underprivileged sections of the society. Regarding the formal legal and political equality in the absence of socio-economic equality as hollow or meaningless, it advocates the transition from a formal to more substantive notions of equality.
- Scholars have broadly identified three forms of equality:
 - a. Equality of Welfare;
 - b. Equality of resources;
 - c. Equality of capabilities.

Besides, there is another kind of equality, that is called 'complex equality'. All these forms of equality are discussed in the following section.

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The socio-economic equality is an extension of the legal, formal, and political notion of equality. So, this is the subsequent stage in the discourse of what equality is. So, the achievement of formal, legal and political equality are followed by the demands for more and more, social and economic equality. In other words, it is about the equality of conditions.

Even, when we have the same rights, we may not be able to realise those rights, if our conditions are different, in the absence of such socio-economic, or political and legal equality. It thus, makes little sense. So, we see in the elections, corrupt practices, parties buying votes, and people are willingly, selling their right to vote for a party or for a leader, who can give them the right value of their votes in terms of money. The role of money and power in the elections is a reflection of the absence of social and economic equality which is actually, detrimental for the effectiveness of both legal and political equality.

Thus, every member is free or equal in legal and political sense, but in the actual sense, he or she is not equal, because he or she lacks the resources or the conditions, where he or she can make decisions freely, independently, and in the autonomous manner. The, socio-economic equality requires reduction of inequality, that is, about the conditions where some people are born in a particular condition and those conditions create certain embodiments for his or her group. Moreover, the social and economic equality requires

that those conditions of inequalities must be reduced.

Now, what is regarded as inequalities is something that is, determined by the prevalent concept of social justice. So, social justice in India, in that sense, is one aspect of equality known as the preferential treatment. Thus, for those societies and sections of society which are historically, and economically marginalised, or excluded from the mainstream, question arises, should we give those sections of society certain privilege, or a preferential treatment which we also, called reservation, like reservations for SC, STs, and OBCs? Does that help in creating a society more equal?

On the face of it, many people will argue that equality is about treating everyone equally. But how we justify, reservation or preferential treatment to certain groups and communities? How far that leads to create a society which is more just, equal and egalitarian? To understand and to explain that we need to understand the conditions of different sections in the society, for which the state as a public institution requires certain preferential treatment for them, to give them equal opportunity or equal chance, to compete with others and rest of the society.

However, what those conditions are which can be determined by the prevalent concept of social justice in that society. It differs from age to age and society to society, as I was saying, in different ages, different conceptions of those conditions of social and economic equality are defined differently. So, socio-economic equality insists on a progressive extension of social benefits, to the weaker, excluded, marginalised and under privileged sections of society.

And regarding the formal, legal and political equality in the absence of such social equality as hollow or meaningless, it advocates the transition from a formal to a more substantive notion of equality. So, that is the idea of social and economic equality, which extends the idea of equality beyond, merely, a political, legal or formal ideal to actually, create conditions of equality in society for everyone, to realise and develop himself or herself.

Now, scholars have broadly, identified three forms of equality that we have been discussing. If equality is understood as a distributional concept, what are those forms or equality that should be distributed? Whether it is equality of opportunity or resources or capabilities, we are going to discuss about it. And we will also, discuss one other form of

equality which we call as the 'complex equality' advocated by Michael Walzer.

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Equality of welfare

- Utilitarian philosophers have generally argued that the project of distributional equality requires distribution of welfare. Here, welfare is understood as both happiness and preferences or satisfaction.
- Its focus is less on how much resources an individual is getting but whether or not such resources are instrumental in securing for him or her a level of satisfaction or happiness that is equal to everyone else in the society.
- However, treating different preferences or choices equally may be morally and ethically objectionable and it may not promote the desired end of fairness or self-respect among the members of that community. And it may also turn out to be detrimental to the cause of social cohesiveness and fraternity.

Equality of resources

- This view is most commonly associated with the views of John Rawls, Ronald Dworkin and Eric Rakowski.
- 'Equality of resources' holds that a distributional scheme treats people as equals when it 'distributes or transfer so that no further transfer would leave their shares of the total resources more equal'. (Dworkin)
- This conception of equality lays emphasis on the centrality of state responsibility towards remedying unequal circumstances among people.

The term equality of welfare is basically, argued by utilitarian philosophers, who believed that the search for human happiness and society must ensure that every member in the society must have the scope and resources for leading a good life. By that, they mean a happy life. And happy life is the yardstick, through which one can judge or assess the effectiveness of public policies.

So, those policies which help individual maximise his or her happiness or to have a good life, or a policy that is good, those policies are desirable. In other words, the idea is to have the greatest good of the greatest number. Thus, the yardstick to judge a public policy is on the basis of whether it enhances the happiness of members in a society or not.

The utilitarian philosophers have generally, argued that the project of distributional equality requires distribution of welfare. This welfare is understood as both happiness and preferences or satisfaction. So, what is happiness, preferences or satisfaction for different individuals or groups in the society, state should not decide it. It should rather provide the conditions and resources for them, to exercise their preferences or to maximise their happiness.

It focuses, less on how much resources individual is getting, but it focuses, whether or not such resources are instrumental in securing for him or her, a level of satisfaction or

happiness that is, equal to everyone else in the society. For them, the yardstick for judging a policy is not just about actual value or resources that individual is getting or not.

For them, the yardstick for distributional aspect of equality is to ensure, whether the individual may have different preferences, and choices, so, somebody may like to travel in a car or somebody, may like a bicycle, and the happiness for both of them differs from each other, and yet their preferences should be treated equally or not. The idea, here, is that individuals in the society are able or should have the opportunity to exercise their freedom or happiness in the same way as other members do or exercise. The focus is more about ensuring the happiness or satisfaction of the member than the actual distribution of resources.

However, treating different preferences as missing somebody or preferring a bicycle over a car is unequal preferences or choices. Now, if these different preferences or choices are treated equally, it may lead, to a moral and ethical objection. It may not promote the desired end of fairness or self-respect among members of that community and it may also, turn out to be detrimental to the cause of social cohesiveness and the fraternity, which equality aspires to achieve.

Now, the second aspect of this distributional aspect of equality is equality of resources. This view is most commonly, associated with John Rawls, Ronald Dworkin or Eric Rakowski, where we find that their emphasis is on the distribution of primary goods. So, that every member of the society should be given same level of primary goods and it should be available to them equally. Now, what they do with those primary goods that should be left for the individuals to decide. The role of the state or public institutions in this conception of equality of resources is to distribute the public goods or the basic goods or primary goods equally, to everyone.

The equality of resources holds that the distributional scheme treats people as equals, when it distributes or transfers, so that, no further transfer will leave their share of resources more equal. The equal distribution is very crucial in terms of, equality of resources. So, this conception of equality lays emphasis on the centrality of state's responsibility towards remedying unequal circumstances among the people. About Rawls, we will discuss his theory of justice.

Again, if the people are treated differently, the idea should be that everyone should be treated equally and they all should have equal opportunity or free and equal opportunity, to develop himself or herself. But, if there is a need to differ from this equal principal, then it must have certain justifications. So, the state has the responsibility to rectify, certain conditions, but those rectifications must be justified, also.

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Equality of capabilities

- According to Amartya Sen the major objective of the distributional conceptions of equality should be about equalizing people's capabilities instead of emphasizing on the distributions of resources or income.
- In contrast to equality of resources, Sen argues that emphasis should be given more on enhancing people capabilities and thereby making them more equal or free. He acknowledge the role of state in making public policies such as regarding education or health care that increases individuals capabilities to participate in the collective life of his and her community as free and equal member.
- Sen put equal emphasis on the conditions of inequality in his analysis. He writes that we are 'deeply diverse in our internal characteristics (such as age, gender, general abilities, particular talents, proneness to illness and so on) as well as in external circumstances (such as ownership of assets, social backgrounds, environmental predicaments and so on)'. Thus, he argues that social policy must be attuned to social diversity i.e. the needs of different sections of the society.

Complex equality

- Michael Walzer gives the idea of complex equality. He argues that it is not enough to distribute the resources or goods. Rather emphasis should be on the creation of public or social goods. The conception or meaning of goods differ from society to society and context to context. Therefore, he argues about the plurality of distributive arrangements.
- 'The basic idea is that all distributions are just and unjust relative to the social meanings of goods at stake'. This approach focuses on the social meanings of goods and the plurality of the spheres of justice.
- It 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 goods.
- It establish a set of relationships such that domination of certain groups over certain goods is impossible.

Now, the next concept is equality of capabilities. According to, Amartya Sen, the major objective of the distributional conception of equality should be of equalising people's capabilities, instead of emphasising on the distribution of resources or income. Sen is arguing, more about creating conditions of capabilities rather than focusing merely, on redistributing resources or the income among the people.

In contrast, to the equality of resources, Sen, argued that emphasis should be given more on enhancing people capabilities and thereby, making them more equal or free. He acknowledged the role of state in making public policies, such as, regarding education, and healthcare that increases individual capabilities to participate in the collective life of his or her communities, as free and equal member.

The equality principle, thus, requires state involvement in making policies, especially, regarding, health care or education, which should be made available for everyone and it should be accessible to everyone which enhances their capabilities. It is not just enough to distribute resources, but also, to ensure how far, those resources or the public

intervention enhances their capabilities. And state has a responsibility to ensure that everyone should have those qualities or services, which enhances their capabilities, such as education or healthcare. Thus, the capabilities or equality of capabilities is more significant than merely, the redistribution of resources.

Sen, also, put forward or emphasis, on the conditions of inequality in his analysis and this inequality requires one to understand the diversity that exists in the society. So, all the members in society do not have the same level of needs, and those needs are determined by their internal as well as external requirements or conditions of existence. So, he writes, we are deeply, diverse in our internal characteristics such as age, gender, general abilities, particular talents, or proneness to illness. Thus, an old or a young or a child has different requirements in terms of healthcare. It cannot be a uniform or equal service which should be applicable to everyone.

Internally, human-beings are very diverse, especially, in terms of their age, gender, general abilities or someone having, a special or particular talent or about something or their proneness to illness, requires different demands or different needs or external circumstances, such as, the ownership of assets, social backgrounds or environmental predicaments. So, these diversities of human existence require diverse needs to be met.

When formulating the policies or social policies, we also, need to take into account the different needs or social diversity exists in society. Thus, he argues, social policy must be attuned to the social diversity, that is, the needs of different sections of the society which vary from one section to other depends upon their internal and external conditions of existence. So, that is the third approach.

The final is the 'complex equality', as argued by Michael Walzer, who gave the idea of 'complex equality'. He argued, it is not enough, to distribute the resources or goods. Rather, emphasis should be on the creation of public or social goods. The conception or meaning of goods, differ from society to society and context to context. Therefore, he argues, the plurality of distributive arrangements. So, there should not be one singular arrangement for the distribution of primary goods.

First, Michael Walzer extended this understanding of primary goods or social goods as not something which is universally, accepted or they should be have a singular arrangement for the distribution or redistribution of those public goods. Michael Walzer

is emphasising more on the social creation or social conception of good, and what are those primary goods. The meaning of which differs from society to society and from context to contexts. Therefore, there is a need for different arrangements or plural arrangements for the re-distribution of primary goods.

The basic idea is that distributions are just and unjust relative to the social meanings of good at stake. So, this approach focuses on the social meanings of goods and plurality of the sphere of justice. It means, no citizen standing in one sphere or with regard to one social good can be undercut by standing in some other spheres with regard to some other goods.

So, it establishes a set of relationship such that domination of certain groups over certain goods is impossible. There is a kind of different spheres, where the domination of one over the other becomes impossible, when people are treated in their unique different existence depending upon their requirements. Therefore, more plural arrangements for re-distribution are to be made rather than one singular distribution.

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Equity, Equality, and Egalitarianism

- Equity and Egalitarianism, nowadays are more desirable terms than the notions of equality. Although, these conceptions are rooted in the ideals of equality in the sense that these enhance the prospect of making a society more equal. Egalitarianism holds that all human beings have equal social and political rights. It regards equality as the basic principle and holds that all people are equal in fundamental moral worth.
- Egalitarianism holds that equality is always just; only inequalities need justifications. For example, John Rawls treated liberty and equality as the basic principles of justice, and sought to explore the conditions under which inequalities could be treated as just.
- Egalitarianism upholds that system where the poor and the weak equally find opportunities for their advancements and development along with the rich and the strong. Equality of outcome is the ultimate goal of egalitarianism. Therefore, it is necessary to differentiate between 'Equality of outcome' and 'Equality of opportunity'.
- 'Equality of outcome' implies equal distribution of rewards such as income, wealth and other social goods. It is to ensure result regardless of the starting point and natural ability through social programmes of positive discriminations in favor of underprivileged or marginalized groups.
- 'Equality of opportunity' is most commonly associated with the liberal democratic tradition. It means in principle that access to important social institutions shall be open to all on universalistic grounds specially by achievement and talent.

Finally, the terms equity, equality, and egalitarianism, we can discuss them also, in the next lecture. But, very briefly, the idea of equity and egalitarianism is now a days, are more desirable terms than the notion of equality or absolute equalities. So, people talk more about equity. The principle of equity is rooted in equality, but it is little different from the idea of equality and so, it is somewhat a different conception. The

egalitarianism is the political struggles or social movements. These terms, like equity and egalitarianism are more in use, than say, as the idea of equality.

Although, their conceptions are rooted in the ideals of equality, in the sense that these enhance the prospect of making a society more equal, however, these are different from the idea of absolute equality. So, egalitarianism holds that all human-beings have equal social and political rights, and it regards equality as the basic principle. It holds that all people are equal in fundamental moral worth. The idea that connects the principle of equity and egalitarianism is deeply, embedded in the idea of equality that is, all individuals are morally equal. Their moral, political, social, and economic worth are one and the same. Therefore, they must be treated equally.

So, egalitarianism holds that equality is always just. Only inequalities need justification. For example, John Rawls treated liberty and equality as the basis of a basic principle of justice. He sought to explore the conditions under which inequalities could be treated as just. So, in their arguments basically, for reservation, I have given an example in this lecture before as well. Thus, everyone should have equal opportunity to get employed. But, if, some communities are treated preferentially, or given preferential treatment, then this difference or preferential treatment must be justified. It must justify, the idea of creating a society more just or egalitarian.


Egalitarianism upholds that system, where the poor and the weak equally, find opportunities for their advancement and development, along with the rich and the strong. So, there should not be any difference or hierarchy among the rich or the strong on the one hand, and poor and the weak on the other hand. Their prospect is only to develop their life. Thus, opportunity should be equal to both of them. The equality of outcome is the ultimate goal of egalitarianism and it is not the starting point that is procedurally, how we start, is not as important as what we achieve, even if, we have the difference principle or principles which treat people differently, or have preferential treatments. Therefore, we need to make differentiate between the equality of outcome and equality of opportunity.

The equality of outcome, thus, implies equal distribution of rewards, such as income, wealth, and other social goods. It is to ensure result, regardless of the starting point and natural ability through social programs of positive discrimination in favour of

underprivileged or the marginalised groups. The emphasis, here, is about equality of the outcome. The starting point or the natural ability of individuals or groups may differ, but they should have the opportunity, to bring them on the same footing or equal footing to preferential treatment or difference treatment is desirable or even, it requires to make the society more just and egalitarian.

The equality of opportunity is most commonly, associated with the liberal, democratic tradition, which talks about the procedural part. It means, principle access to important social institution shall be open to all on universal grounds, especially, by the achievements and talents. So, it focuses, more on the opportunity through which individual can achieve certain socio-economic, political status in society and it should depend on the talents or their merit. The outcome principle is different where it treats everyone equally.

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And ensure that despite of, their different backgrounds or natural abilities; they should have the same level of playing field in the collective life of the society. We will continue this discussion on equity and egalitarianism in our next lecture. For today's lecture, whatever I have covered, you can refer to some of these books which are mentioned here. Ashok Acharya's, 'Equality' from Rajeev Bhargava and Ashok Acharya's book. Then, these are some of the books like John Dryzek, Hoffman, William Bernard, Richard, Anderson, John Hoffman, Sven Hanson, and Scheffler or McKerlie's book, you

can refer to. So, these are some of the texts which you can refer to, for today's lecture.

Thank you for listening.