

PHILOSOPHY PLAYS ROLE IN THINKING ABOUT SOCIAL EQUALITY

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Recent developments in political philosophy have shed light on the justification for equality, the shape an equal society would take, and the route which will lead us there.

Inequality is perhaps the greatest challenge South Africa faces today, and the current economic downturn is likely to exacerbate it. Effective policies making for a more equal society are urgently required. Can philosophy help frame them?

The idea of equality has been at the centre of philosophical thinking about politics and society since the 18th century, and it continues to preoccupy political philosophers, not least in South Africa. The Cape Town Social Equality Conference, hosted on 15 to 17 August 2014 by the Philosophy Department at the University of Cape Town, was devoted entirely to equality: its nature, value and how to achieve it.

EQUALITY OR FAIRNESS?

Although it has widespread appeal, equality can be seen as a rather arbitrary ideal. From a humanitarian point of view, to relieve suffering or to uplift people living in absolute deprivation are immediately comprehensible goals. The same is not true of equality: why should an equal distribution of resources be considered as good in itself?

Concerns of this kind can drive people to abandon “equality” and embrace an ideal of “fair shares” instead. *Fairness* tells us to focus on individuals’ diverse contributions to society. According to a familiar conception of fairness, those who have contributed more and sacrificed more

for society’s joint endeavour merit a larger share of the social product. Those who choose not to contribute so much can fairly receive a lesser share.

Fairness can be an unforgiving ideal. People who live a life of deprivation due to imprudent choices made in their youth may, according to fairness, be only getting what they deserve. As a consequence, many advocates of fairness grant that fairness must be tempered by *humanitarianism*: a caring determination that nobody, however lazy or irresponsible, should experience absolute deprivation beyond a certain level.

But South African society offers inhospitable terrain to fairness. The country’s history of oppression and exclusion ensures that inherited privilege or disadvantage determine individuals’ contributions to society to a far greater extent than their free choices. Judgements about fair shares are thus well nigh impossible. Under the circumstances, an equal distribution of resources becomes attractive as a “reset to default” position, enabling policy to be based on fairness eventually, at some point in the future.

Is this the most that can be said for equality, then – that it is a tolerable understudy when fairness is indisposed?

Egalitarian political philosophers think not. In recent years they have argued it is mistaken to view an equal distribution of resources – *distributive equality* – as the egalitarian goal. Rather, distributive equality (or something close to it) is only valuable because it tends to foster *social equality*. And social equality is not a matter of how much people have, but of their standing in relation to one other. The new egalitarianism in political philosophy says that the equal society is not primarily a society in which people have equal amounts, but rather a society in which people meet each other on equal terms.

This relational conception of equality enjoins us to avoid asymmetric relations of hierarchy, deference, domination, exclusion, exploitation, servility and humiliation (Wolff, 2015). In effect, theorists of social equality argue that the true egalitarian goal is a form of *social cohesion*. Not just any form of social cohesion, though, and most certainly not a form achieved through systems of violent coercion, practices of habitual deference, or myths of natural superiority and inferiority.

Discriminatory laws and conventions of oppression have created societies marred by stigma, exclusion, hierarchy and relations of domination. Theorists of social equality stress that an excessively unequal distribution of resources can have much the same effect. So the new egalitarianism views distributive equality not as an end in itself but as a necessary means to achieving a cohesive society of equals.

What, then, becomes of fairness? Should individual effort and responsibility have no impact at all on the distribution of resources in a society?

Egalitarian political philosophers increasingly view equality and fairness

as two independent and potentially conflicting values. The distribution of resources can depart from equality for reasons of fairness as long as the inequality is not extreme enough to bring about hierarchy, exclusion, domination and other unequal relations. But there will be situations where shortfalls in fairness must be tolerated because of the overriding value of creating a society of equals.

EQUALITY OF WHAT?

Whether our focus is fairness or equality, we must next ask about the “currency” of egalitarian justice. What is it that should be distributed equally? Or what should people have fair shares of?

“Money” is an obvious answer. Income and wealth are quite easily measurable. They can be exchanged for a host of both necessities and the good things in life. And redistributing them is, in principle, relatively straightforward.

Yet, as the Indian philosopher-economist Amartya Sen has insisted for decades, we must beware of equating the currency of commerce with the currency of justice. Money is a means to achieve valued goals rather than an end in itself, and the same amount of money may translate into very different levels of wellbeing for different individuals. Freedom from disease and the ability to move around independently are both valuable



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aspects of human wellbeing. But for a disabled person, who may need stairlifts and a wheelchair, it evidently costs more to achieve a decent degree of mobility than it does for an able-bodied person. Likewise, avoiding debilitating disease is likely to be a more expensive affair for people who live in the midst of water-borne parasites than for people who do not.

There is an important lesson here for advocates of fairness. Fair shares cannot be determined solely by looking at people’s different contributions to society. Their different needs – whether due to environment or their physical constitution – must be taken into account as well. And advocates of equality must look beyond money for the currency of egalitarian justice.

According to the American philosopher Martha C. Nussbaum, the appropriate measure of a person’s wellbeing is not their income or wealth, but rather what they are actually able to do and be. Her list of ten “central human functional capabilities” includes things like “affiliation” and “control over one’s environment”. Nussbaum would be the first to point out that an equal distribution of such capabilities requires institutional change rather than just a redistribution of cash.

Other philosophers use the language of “capabilities” to try to pin down the rich and multifaceted nature of the human good. Feminist philosopher Miranda Fricker has argued that theories of justice and human wellbeing must not view people just as consumers, workers and planners. Humans also flourish, or suffer, as communicators and interpreters of the social world in their *epistemic* (knowledge-related) roles. Those who are marginalised because of their gender, sexual orientation or racialised group, argues Fricker, often face forms of injustice in their capacity as knowers. For one thing, societal prejudice may >>

mean they are not taken at their word or that what they say is not taken as seriously as what others say. This Fricker calls *testimonial injustice*.

More deep-seated, indeed existential, harm is done by what Fricker calls *hermeneutical injustice*. This form of injustice is of particular relevance to postcolonial societies, such as South Africa, in which it often occurs along racial lines. Hermeneutical injustice arises when a marginalised group is systematically excluded from arenas of knowledge production and opinion formation – politics, the arts, academia and the media. In South Africa, this form of injustice was diagnosed by the Black Consciousness thinkers Steve Biko and Barney Pityana in a series of brilliant essays in the 1970s.

Marginalisation from knowledge production can create a situation where experiences that are specific to a racialised group – relating to indigenous cultures, the new urban black culture, or racial discrimination and oppression – cannot be communicated with the linguistic resources of the cultural mainstream. Members of the group in question may find themselves unable to articulate some of their central social experiences in anything other than a distorted way (as “superstition”, “barbarism”, etc.). They may even lose a sense of who they truly are. To contrast it with the material hardship that colonialism and apartheid inflicted on black South Africans, Biko and Pityana called hermeneutical injustice “dehumanisation” and “spiritual poverty”. To suffer hermeneutical injustice is to find oneself bereft of the concepts and forms of discourse necessary to communicate – and even to articulate adequately to oneself – important social experiences, due to the marginalisation of a social group to which one belongs. It can continue long after the group attains legal, or even material, equality (Hull, 2017).



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Fricker has stressed that no conception of human wellbeing can afford to ignore the epistemic aspect of the human good. She now argues that *epistemic contribution* – the capability to contribute to the flow of information and interpretations which makes up the epistemic life of a society – should be added to Nussbaum’s list of central human capabilities (Fricker, 2015).

HUMILIATING AID

As noted above, the new egalitarianism in political philosophy does not view distributive equality as an end in itself. An equal distribution of resources (or something close to it) is valuable as a means to social equality – to achieving a society whose members relate to one another as equals.

If this way of thinking about equality is correct, then it would clearly be counterproductive to try to bring about distributive equality in ways which themselves create division, stigma and hierarchy. Paradoxically, a society’s attempts to uplift disadvantaged people may themselves erect barriers to social equality. Means testing for welfare benefits, state services or financial aid is a case in point.

Extensive and intrusive means testing often has the effect of undermining social equality. It can be experienced as humiliating or

demeaning when it requires people to make shameful revelations. It can also give the impression that people subjected to the means test are not trusted equals, but rather objects of distrust and suspicion. Further, means testing can all too easily play into a divisive narrative which represents one group of people in society as able to “fend for themselves” and stigmatises another as, at best, “scroungers” or, at worst, dishonest “cheats”.

Finally, extensive means testing can communicate disrespect to the poorest in society when they are subjected to a level of scrutiny and control not experienced by the better-off. All in all, state assistance that depends on a means test often ends up being – in the words of philosopher Elizabeth Anderson – “humiliating aid”.

Issues raised by students during the October 2015 campus protests resonate with these warnings. Wits student Phaphama Dulwana wrote of “the humiliation of standing in a National Student Financial Aid Scheme line, of being treated like a number while your entire future hangs on how someone’s day is going, being told you have to prove the degree of your impoverishment.” A member of the UWC Fees Must Fall movement, Thozama Nozuko, wrote in a similar vein: “[W]e are calling for the student credit management office, which expects students to prove their poverty before every registration, to fall.”

Some circumstances, such as disability, will almost always require individual assessment for need. However, from the point of view of social equality, universal benefits are clearly preferable. For example, a system of quality healthcare provision that is free at the point of delivery for all removes the need for means tests.

In the case of university tuition, full public funding is objectionable from a fairness perspective. It would not be fair for all members of society – even the very poorest – to be made

to pay for a competitive advantage enjoyed by the minority who attend university (Cudd, 2015). But this does not mean that a solution involving universal non-means-tested provision is ruled out. Universal eligibility for a comprehensive student loan to cover fees and living expenses, with income-contingent repayment, would reconcile the values of fairness and equality. If well designed, with a rational interest rate on the loans, this policy would also be affordable (Hull, 2016).

PHILOSOPHY'S ROLE

In South African universities and intellectual circles, the discipline of philosophy – especially “analytic” philosophy – is viewed with some suspicion. One hears it asked whether philosophy has ever contributed anything of social relevance, or indeed, whether we really need philosophy departments.

I would be the first to defend the value of academic teaching and research with no measurable social impact. Still, it is troubling to hear about bright, engaged activist intellectuals wishing to study issues of justice, power and social change being turned away from South African philosophy departments in the 1980s and beyond. Evidently, many South African intellectuals, academics and activists of the older generation had bruising run-ins with analytic philosophy at a time when it was narrowly focused on questions about the nature of linguistic meaning and the definition of knowledge. It is understandable that some take for granted that the transformation of the academy must involve moving beyond analytic philosophy.

The truth, though, is that there is no distinctive subject matter of analytic philosophy. All the philosophers whose work I have discussed in this article would likely be classified as analytic, though the topics of their research are far removed from those of the



“logical positivists” and “linguistic analysts” of the 1950s. What is more, the hallmarks of the analytic style and method – precision, patient analysis of concepts through the drawing of distinctions, systematic analysis of arguments – are hallmarks of much of the best philosophy, as indeed of other intellectual work, from all traditions and all epochs.

Philosophy cannot hope to solve the socio-political problem of inequality on its own. But it can attempt to articulate the variety of wrongful forms of inequality, and to frame concepts, arguments and principles upon which policymakers and activists can draw to address them constructively. As discussed here, the new egalitarianism in political

philosophy warns us not to confuse the goal of equality with the means used to achieve it. Furthermore, it can help policymakers avoid counterproductive methods of redistribution that end up undermining social equality.

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