COMPLEX EQUALITY AS AN APPROACH TO RELATIONAL EQUALITY

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Abstract

Is complex equality an obsolete topic for political philosophy? This thesis argues that it is not, by showing that complex equality needs to be included in the conception of relational egalitarianism. It shows that complex equality shares the fundamental relational egalitarian view that what makes distributive concerns morally important is the relevance of distribution for relational equality. Furthermore, it shows that complex equality sufficiently treats certain problems that relational egalitarianism faces. The argument begins by pointing out that relational egalitarianism is a plausible theory of equality to begin with. It tries to explain why relational egalitarianism is a better conception of equality than distributive egalitarianism. It then goes on to argue that complex equality is a promising approach to generate and maintain relational equality, due to its assumption of separation of spheres of distribution. Finally, Arneson's critiques against complex egalitarianism are examined. His critiques have not met any answer for twenty-years. This thesis aims to refute them in order to make the defense of complex equality complete.

Table of Contents

Introduction **1**

Chapter 1: Complex Equality **3**

1.1. Walzer's Conception of Complex Equality 3

1.2. Miller's Conception of Complex Equality 6

1.3. Which Conception to Take Forward? 9

Chapter 2: Relational Equality and Complex Equality **14**

2.1. Defense of Relational Egalitarianism 14

2.1.1. Relational Equality and Distributive Equality 14

2.1.2. Specification of the Ideal of Relational Equality 16

2.1.3. Why Relational Equality, rather than Distributive Equality 19

2.2. Varieties of Relational Egalitarianism and Defense of Justice-Based Pluralist Relational Egalitarianism 26

2.2.1. Varieties of Relational Egalitarianism 26

2.2.2. Defense of Justice-Based Pluralist Relational Egalitarianism 28

2.3. Complex Equality as an Approach to Relational Equality 32

2.3.1. Relational Egalitarian Constraints on Distribution 33

2.3.2. The Need for the Separation of Spheres for Relational Equality 35

2.3.3. Miller's Complex Equality Revised 37

Chapter 3 Defense of Complex Equality Against Arneson's Critiques **39**

3.1. The Intrinsic Value of Relational Equality 39

3.2. The Plausibility of Separations of Spheres 42

3.3. The Conceptual Link Between Complex Equality and Relational Equality 43

3.4. The Freedom from the State's Domination 44

3.5. Conflicts between Relational Equality and Other Values 45

Conclusion **47**

Bibliography **48**

Introduction

In his book *Spheres of Justice* published in 1983, Michael Walzer offered a new account of justice called *complex equality*. The starting point of this theory is the assumption that the goals of justice is to achieve non-domination and equality of status among citizens in a political community. Building on this assumption, he claimed that there are different kinds of social goods and each kind of social good has a particular principle of distribution, and that this pluralism of distributive principles is essential to the achievement of non-domination and equality of status. Later in 1995 in his book *Pluralism, Justice and Equality*, David Miller provided a revised theory of complex equality, elaborating on the reasons why the pluralism of distributive principles gives rise to non-domination and equal status, while Richard Arneson proposed objections to both Walzer's and Miller's accounts of complex equality in the same book. Arneson's critique was five-fold. First, the theory of complex equality is built on the false assumption that non-domination and equality of status are intrinsically valuable. Secondly, the theory calls for the separation of *spheres* (sets of goods with associated customary beliefs, values, and expectations), but this is an empirically implausible project. Third, the link between pluralism and non-dominance and equality of status is untenable. Fourth, the link between pluralism and freedom from the state's domination is untenable. Last, Miller's contention that complex egalitarianism does not face conflict between values and therefore it is superior to other egalitarian doctorines is unfounded.

In the following thesis, I examine Arneson's critiques in detail and demonstrate that they are false. Furthermore, I claim that complex equality does not only survive Arneson's refutations but also retains its value as an approach to relational egalitarianism. Relational egalitarianism is the view that the aim of equality is to achieve social relationships in which people treat each other

as equals, rather than to award people with equal share of goods. My argument proceed as follows. In Chapter 1, I provide overviews of Walzer's and Miller's conceptions of complex equality in order to aid and clarify the following discussion. It argues that Walzer's account of complex equality is characterized bya an implausible communitarian assumption, and therefore, we should prefer Miller's account. In Chapter 2, drawing on the literature on relational equality, I first explain the theory of relational equality, making the differences between relational equality and distributive equality explicit. Then, I defend relational egalitarianism through a criticism of distributive egalitarianism. Distributive egalitarians want to infer directly from the premise of equal moral status a concern for a concern for distributive equality. This is a mistake, however. What follows from equal moral status directly is a concern for egalitarian social relations. I go on to argue that while there are a few versions of relational equality, the one that assumes that equality is fully subsumed under justice and justice encompasses multiple values, which I call *justice-based pluralist relational egalitarianism*, is the most plausible of all. Consequently, it is established that the justice-based pluralist account of relational equality must adopt the strategy of complex equality, namely the separation of spheres of distribution, in order to achieve its aim. Finally, in Chapter 3, I summarize Arneson's five critiques and provide a response to each of them, one by one. Throughout the thesis, relational equality is used to indicate social equality, as social equality and relational equality are used as synonymous by relational egalitarians in the literature.

To my knowledge, no one has defended complex equality since the publication of *Pluralism, Justice and Equality* in 1995, so the theory of complex equality is perhaps considered obsolete by political philosophers today. However, if my argument in this thesis is successful, then it will be shown that there is reason against abandoning the theory.

Chapter 1: Complex Equality

This chapter is devoted to a description of the theory of complex equality. I describe both Walzer's and Miller's accounts of complex equality and highlight the similarities and differences therein. I go on to argue that Miller's account is more plausible than Walzer's. This is due to the fact that Walzer's account is based on by a communitarian assumption that takes the conception of justice shared within a particular political community at a particular time as the criterion of justice and this assumption makes his theory self-defeating. This is not to say that Miller's account is free of flaws, however, so I end the chapter by pointing to unclarified issues involved in Miller's account which I address later in the thesis.

1.1. Walzer's Conception of Complex Equality

Complex equality was developed by Walzer as a concept to replace what he called simple equality. Simple equality as Walzer defines it is the condition in which everyone in a political community has the same amount of money. However, simple equality is usually formulated to include equality in the share of other material goods and services in addition to money (Gosepath, 2011). and I shall use this formulation here. So, when simple equality is achieved, everyone in the society is furnished with the same material level of goods and services over the course of their lives. Employing this alternative formulation will not cause any problem for analyzing the strength of the claim of complex equality against simple equality. This is because Walzer seems confident that his objection against simple equality extends to all varieties of principles of equality, if, whatever goods and services they would prescribe that everyone should get the same quantity and quality.

According to Walzer, simple equality is indefensible for two reasons. First, he contends that "*the aim of political egalitarianism is a society free from domination* (1983: xii)", and material equality does not matter intrinsically. It matters only instrumentally to the extent that it enables people to have social relationships in which nobody dominates another. Therefore, simple equality is a misinterpretation of the demand of justice. Secondly, initiatives to achieve simple equality necessarily lead to the domination of certain people over others, or the tyranny of the state, according to Walzer. This is so due to the fact that individuals vary in such qualities as talent, foresight, and determination and these varying qualities affect the outcomes of free exchange, producing inequalities in wealth over time which consequently allows a certain group of people to dominate others. To remedy these inequalities and maintain simple equality would require continuous unjustifiable interference with individual liberty. In short, while free exchange leads to domination by a fraction of people over others in the society, simple equality is not a solution because it introduces a new problem, namely that of excessive statism.

At a first blush, this seems to be a repetition of Nozick's libertarian argument against state intervention. However, Walzer is not yet another libertarian. He does not argue against state intervention from inviolable individual rights. Instead, he makes this argument based on a communitarian assumption. Walzer holds that there is no such a thing as a universal theory of justice and the requirements of justice can be only identified in the shared understandings of the members of a particular community. For a state's interventions to be legitimate, therefore, they must conform to communal understandings of the goods embodied in the various spheres. What is violated by the states' efforts to maintain simple equality is the freedom to live one's life in conformity with shared understandings of the goods and services of the particular society to which he belongs.

These two objections against simple equality bring Walzer to the ideal of complex equality. Complex equality assumes that each sphere of justice has a distinct criterion of distribution and this criterion is derived from social understandings of the particular good. The world "sphere" indicates a set of social practices, with associated customary beliefs, values and expectations, say, health, education, or income. For instance, according to the conventional understanding of income in the Japanese society where a seniority system is prevalent, the amount of income is appropriately determined by the employee's age and the length of his employment at the firm. So if we were to follow Walzer's claim, this is the criterion of distribution of income we ought to adapt in Japan.

As each sphere has its distinct criterion of distribution, there would be multiple criteria of distribution, not one. Complex equality is a pluralistic idea in this sense. The pluralistic approach is claimed to be superior to the monistic approach with a single criterion, because "*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)." Put more concretely, while in each sphere distinct inequalities will persist, given the plurality of spheres, eventually every person will acquire goods in one sphere or another. For instance, citizen X may be chosen over citizen Y for political office, and then the two of them will be unequal in the sphere of politics. Nevertheless they will not be unequal generally so long as X's office gives him no advantage over Y in any other sphere – superior medical care, access to better schools for his children, entrepreneurial opportunities, and so on. Hence, complex equality presents equality of status overall, even though people need not have equal shares of goods in the various differne spheres of justice. non-dominance and equality of status is tenable thorough the pluralistic approach. Of course, this is only feasible where the sphere of politics is unaffected by other spheres. If one particular sphere dominates others, then those who outrank others in this particular sphere would be able to outrank

them in other spheres too, leading to the dominance and collapse of equality of status in the society. So in the above-mentioned example, X should not be able to use the opportunities gained in the political sphere to outstrip Y in other spheres. Thus, Walzer proposes a system in which exchanges in each sphere are blocked from other spheres: it should be avoided that goods obtained in one sphere are exchanged to obtain goods in other spheres.

1.2. Miller's Conception of Complex Equality

Miller's takes the theory of complex equality as an objection not only against simple egalitarianism, but against distributive egalitarian theories in general. This is evident in his definition of simple equality. He conceives simple equality as a situation where everyone is possessed or enjoys some advantage X, where the candidates for X include rights, opportunities, and capacities as well as material goods and services. As mentioned above, simple equality is conventionally understood as the equality of the quantity and quality of certain material goods and services. Hence, Miller widens this conventional notion of simple equality by including non-material social goods, such as opportunity and rights, and by doing so, he virtually equates simple equality with overall distributive equality. This is not the case under the conventional definition of simple equality. Hence, Miller's target can be said to be distributive equality in general, rather than just simple equality as conventionally understood.

Miller offers support for complex egalitarianism on the grounds that complex equality gives us a different and more plausible understanding of the ideal of equality. He contends that equality is best interpreted as equality of status, i.e. a condition of a society in which "*people deal with one another simply as individuals, taking account only of personal capacities, needs,*

achievements, etc., without the blocking effect of status differences (Miller 1995: 207)." This conception of equality is fundamentally different from distributive equality, because it takes the overall character of social relationships as its content rather than the distribution of a certain property X. Elsewhere, Miller appeals to our intuition using the notion of condescendence in order to highlight the importance of social relationships. "Condescension" has a negative connotation. In other words, to characterize someone as condescending is to condemn him, and therefore, condescension is a vice. Why do we consider it as a vice? We do so because to be condescending it to claim a higher status, a status that one is not entitled to (Miller, 1997). If we agree that this is the understanding of condescendence, then we cannot ignore that equality of status matter to us.

It should not be misconstrued that Miller's intention is to flatly deny the value of distributive justice. Rather, Miller's claim is that equality as equality of status is an *independent* value that cannot be equated with distribution or subsumed under justice. Equality of status is not equivalent to distribution for the above mentioned reason; it is about the characteristics of social relationships rather than a certain property X. Furthermore, while equality of status is a moral good, it is a good independent of justice. As Miller puts it, "*Justice comprises the various criteria that govern the allocation of social goods; it is a distributive notion. Equality is a predicate of the whole society within which many just distributions occur* (Miller, 1995: 201)". Hence, the connection between equality of status and distribution is simply empirical. Just distributions are more likely to give rise to equality of status but there is no conceptual necessity that links distribution and equality of status.

Miller continues to defend the theory of complex equality by elaborating the question as to why the pluralistic approach to distribution gives rise to equality while the monistic approach does not. Walzer's answer to this question is that it is simply unlikely that one wins out in all the spheres,

once spheres are blocked to influence one another. This answer is not sufficient because it does not explain why one cannot win out in all the spheres of distribution. However, there is no prima facie reason to assume such scenario. Let us go back to afore-mentioned case of X and Y. X defeats Y in the political sphere and gets chosen for a political office. He does so because he is a person with a higher ambition than most of the people in his society. Even if X cannot use his political power to improve his position in another sphere because spheres are blocked, it seems that X is still more likely to win in other spheres, such as medical care, access to education for his children, and entrepreneurial opportunities, because his ambition enables him to seek for higher level of these social goods while others who are less ambitions are incapable of doing so. So it seems that there is no prima facie reason to assume that one cannot win in all spheres, even when different criteria of distributions are applied to them and they are separated from each other.

Miller offers a different, more convincing explanation. He claims that it is not required that no individual outranks any other individuals in all spheres or many important spheres, because status judgements are made not by considering how particular individuals rank against other particular individuals, but by considering individuals or sets of individuals against society as a whole. So, for X to regard Y as inferior because Y is a woman, for instance, it is not enough that Y's overall level of attainment of social goods is lower than X's. For such prejudice to occur, women in this particular society in general must fare worse than men. Thus, what is required in order for equality to emerge in Miller's view is that no social group, rather than individual, outranks any other social groups in all spheres or many important spheres.

Finally, Miller critically examines his theory and offers a way to respond to a possible objection. It might be argued that one sphere of distribution, say income, may become so pre-eminent that people can be ranked socially simply on the basis of how they perform in that sphere.

Miller's reply is as follows. First, there is no conclusive empirical evidence that one sphere has become so prominent. Historically speaking, it is usually the congruence of advantages and disadvantages in each sphere that generated or maintained status differences.[1] Secondly, there is nothing inevitable about the dominance of a sphere. In so far as the ideal of complex equality requires us to search for those arrangements that best contain dominance we should have no reason to think that such a search is futile.

1.3. Which Conception to Take Forward?

In this section, I would like to highlight that Walzer's conception and Miller's theories of complex equality are not identical with each other by pointing to the differences that may have not been clear so far, and thus deciding which account is more plausible.

Perhaps the most fundamental difference between Walzer and Miller is their conceptions of justice. Walzer is a communitarian thinker and argue against the universalizability of the idea of justice. He claims that for social criticism to be valid, it must be in accordance with the habits and traditions of people living in specific times and places. Therefore, liberals who try to establish principles of justice by abstracting from particular social contexts are expected to be philosophically incoherent and their criticisms will be irrelevant to the audience (Walzer, 1983). This communitarian assumption is explicitly applied to his theory of complex equality, as he thinks that distribution in each sphere is just if distribution is done according to the existing norms and understandings of the particular social good under consideration within a particular

[1] There are numerous empirical works that provide evidence for this claim. I cite a well-known work by Townsend (1979) as an example here.

political community. In contrast, Miller is a liberal thinker. While Miller rejects moral universalism[2], he nevertheless agrees that basic human rights apply to all communities (2002).

I argue that this difference between Walzer's communitarian assumption and Miller's liberal assumption gives us a reason to prefer Miller's account over Walzer's. According to Walzer's account, we have to accept an existing social understanding of a good in a particular community as a valid criterion of distribution even if it is ridden by a prejudice against a certain group of people. Let us imagine a community in which people believe that women need less education than men, because women's primary responsibility is reproduction and education is unnecessary for reproduction. This seems to be the case of dominance which Walzer takes as unjust, yet according to his theory, this is a legitimate criterion of distribution of education on the ground that the majority of people share this understanding of education. So Walzer defeats the purpose of the theory of complex equality. He might fend off this criticism by arguing that men's dominance over women can be avoided insofar as the separation of spheres is maintained and other spheres are shielded from the effect of the unequal distribution of education, but this is a weak response as we can easily imagine social understandings of other goods in this community are also tainted by the prejudice against women. For example, women do not need as much labor market opportunities as men because their primary responsibility to reproduce. It seems that Walzer's account is doomed to be self-defeating. In contrast, Miller explicitly rejects the requirement that the criterion of distribution should be determined by the social meaning (1995: 222) and avoids this contradiction.

[2] Here, moral universalism indicates the assumption that there are moral principlesthat applies universally across all political communities regardless their culture, history, etc. Proponents of such conception of justice include Thomas Pogge and Martha Nussbaum (2013)

Miller's account is advantageous in another way. As described above, Miller's account is a critique of distributive equality while Walzer's account only targets simple equality. I believe that Miller's wider focus is more beneficial considering that there is an implicit consensus among distributive egalitarians, if not explicit, that simple equality is an untenable principle. This is so for several reasons, the most widely claimed are the following. First, equality and efficiency need to be placed in a balanced relation and simple equality fails to achieve this, as it distorts incentives promoting achievement in the economic field (Okun, 1975). Secondly, simple equality does not take into account the differences among individuals and their situations. Thus, individuals are in fact unequally regarded by simple egalitarians. Lastly, most egalitarians presently do not advocate an equality of outcome, but different kinds of equality of opportunity, due to their emphasis on individuals' responsibility for their decisions (Gosepath, 2011). Hence, I claim that simple equality is an obsolete target. The more reasonable strategy for complex egalitarians to take is 1) establish that equality should be conceptualized in relational terms as equality of status, rather than distributive terms as equality of a certain property and, 2) establish that equality of status is not reducible to distributions. In other words, equality of status cannot be achieved simply through distributions, and therefore, equality of status cannot be equated with distributive equality.[3] The third step is to elaborate on what distributive principles are compatible with equality of status. I believe that Miller's argument roughly follows these steps.

To say that Miller employs a better strategy does not mean that he implements it successfully. At step 2) where he establishes that equality of status is not reducible to distributions, he does so by claiming that equality of status and distributive justice are two independent values

[3] Christian Schemmel claims that equality of status is indeed reducible to distributive principles. I believe that his view is highly implausible. I discuss his theory in detail later in the essay.

that are separate from each other. While justice requires certain patterns of distribution of social goods, equality of status is not a demand of justice but simply a good. Yet, why so? Although his explanation for this claim is surprisingly scant, I believe that he makes this claim because to consider equality of status as a demand of justice would make it too morally demanding. The following example provided by Miller offers us a reason for this interpretation. Let us suppose that in a school, there is a boy who wins out in all aspects of school life, such as exams, sports, arts, etc. He is able to gather all these honors because he is naturally talented and works very hard. Miller argues that it is clear that this case is not unjust, but it is still regrettable that other children do not gain any honors (1995: 204). However, this example is not a case of inequality of status. Let me emphasize the definition of equality as cited above; equality of status is a condition of a society in which "*people deal with one another simply as individuals, taking account only of personal capacities, needs, achievements, etc., without the blocking effect of status differences* (Miller 1995: 207)." According to this definition, there is no status difference between the boy and other students given that the boy's accomplishments are all due to his capacities and efforts. Thus, this example fails to support that equality of status is a justice-independent value, and Miller provides no additional reasons to defend his claim. This leaves his account vanishingly weak.

Furthermore, his account leaves us with a puzzling question. The separation of spheres and the pluralism of distributive criteria are the distinct characteristics of complex equality and this approach to distribution is argued for because it is more likely to generate equality of status, compared to monistic distributive approaches. However, if equality of status is a justice-independent value, then it is unclear why it is able to constrain the pattern of distribution, which is a demand of justice. In other words, is Miller claiming that there must be a trade-off between

fairness and equality? If so, why does equality, which is independent of justice, takes precedence over fairness that is derived from justice?

In summary, whereas we have reasons to prefer Miller's account over Walzer's, it still remains unclear whether complex equality is a worthy theory due to these issues left ambiguous by Miller. The next chapter is thus devoted to analyzing whether equality of status is a justice-dependent or independent value and the link between equality of status and distribution. Further, I offer a revised account of complex equality.

Chapter 2: Relational Equality and Complex Equality

In this chapter, I defend complex equality as an approach to relational equality. The argument takes the following order. First, I introduce and defend relational equality as a better conceptualization of equality against distributive equality. While clarifying the differences between relational equality and distributive equality, I argue that relational equality is more plausible because distributive egalitarians move from the notion of equal moral status of persons straight to distributive issues without clarifying what relationships among people as moral equal should be like whereas relational egalitarians offer a picture of the structure or character of such relationships and goes on from there to consider distributive concers. Second, I argue that relational equality should be considered as a demand of justice that subsumes distributive concerns. This entails that relational equality is not a good independent of justice as some relational egalitarians claim as well as that distributive principles cannot be determined independently of concerns for relational equality. Finally, it is demonstrated that the ideal of complex equality is the same as relational equality, and thus it can be considered as one variation of relational equality. Furthermore, the theory of complex equality which assumes pluralism of distributive pricniples is a better approach than monistic theories because the separation of spheres is necessary to prevent inegalitarian relationships.

2.1. Defense of Relational Egalitarianism

2.1.1. Relational Equality and Distributive Equality

The accounts of relational equality and distributive equality both share the same starting point: the assumption that all persons have an equal basic moral status, and therefore, all persons are entitled

to equal concern by social and political institutions. From this assumption of equal moral status, distributive egalitarians want to derive the claim that respecting persons can be equated with the entails a fair assignment of benefits and burdens. In other words, distributive equality is a notion that describes identifies equality as equality of "something". There are a number of candidate properties for this "something" – resources, welfare and opportunity and so on, and distributive egalitarians disagree about this question of "equality of what". This disagreement is not crucial to our discussion, however. What matters for our current purpose of distinguishing distributive equality and relational equality is that distributive egalitarians agree that equality is obtaineds when something is distributed in a fair manner. Examples of distributive egalitarian theories include theories of simple equality of outcomes according to whichwhich aim atevery human person must enjoy the the same material level of social goods, say income, irrespective of any other factor, and luck egalitarianism that makes a distinction between choice and luck, takes it the moral imperativeand demands neutralization only of inequalitiesto improve the condition of people from simple badbrute luck so that people have equality of opportunity.

The proponents of relational equality understand the premise of equal moral status differently. They claim that it is a principle to govern the relations in which people stand to one another and equality should be viewed as an ideal governing certain kinds of interpersonal relationships. Hence, equality in their view can be conveyed through, among other things, attitudes and expressions and the scope of the principle is wider that of distributive equality: it guides not only the government's distributive conducts but how people and institutions regard and treat each other in general. Hence, rRelational egalitarians claim that equality cannot be obtained solely through the distribution of "*divisible, privately appropriated goods, such as income and resources, or private enjoyed goods, such as welfare* (Anderson: 288)" and debate on distribution is based on

misinterpretation, and theorizing of justice needs to shift its focus back on the fundamental level on the structuring of social and political relations. We have to inquire into the substantive nature of the particular kinds of social and political relations that constitute the overall relation before tackling the question of distribution.

2.1.2. Specification of the Ideal of Relational Equality

In contrast to distributive egalitarian theories which specify certain pattern of distribution of certain goods, the relational egalitarian ideal of "*a community in which people stand in relations of equality to others* (Anderson, 1990: 288)" is more abstract idea. We are led to ask what kind of relationships, more specifically, relational egalitarians take to be the ideal. This section is devoted to such specification.

Scheffler claims that equal relationships are "*relationships that are, in certain crucial respects at least, unstructured by differences of rank, power, or status* (2015: 24)". Similarly, Miller argues that relational equality is "*the idea of society in which people regard and treat one another as equals, and together from a single community without divisions of social class* (1997: 83)".[4] But what exactly does it mean to treat each other as equals in relationships? "To treat each other as equals" is too vague because we cannot determine which relationships or systems are compatible or incompatible with relational equality. The details need to be filled in. Also, focusing on status per se seems to be misleading, as status differences occur widely in a society and some of them seem to be morally unobjectionable. Take teacher-student relationships at school or senior-

[4] As Miller makes a similar statement using the word "status" in another article by him (Miller, 1997) I take that he uses "status" and "class" are synonymous.

junior relationships at work, for example. There is a clear sense in which these relationships are hierarchical but we do not usually consider them objectionable. Hence, relational egalitarians face the need to flesh out what property makes status differences egalitarian or inegalitarian. Schemmel has rightly argued that what relational egalitarians are interested in is *norms* of social status that "*determine the degree that particular achievements character traits, talents, abilities and pursuits are to be rewarded with particular social esteem such as verbal recognition, gestures and other physical behavior signifying particular recognition* (2015: 156)". Our task, then, is to identify what kind of social status norms are ideal for relational egalitarians.

As Jonathan Wolff points out, the proponents of relational equality tend to give content to "treating each other as equals" by identifying what it is not, i.e. giving instances in which relational equality seems to be violated (Wolff, 2015). Such instances include: slavery, class systems, racism, sexism, aristocracy, eugenics, and so on.[5] What characteristics do these cases have in common that makes them incompatible with relational equality? According to Fourie et al, one way to describe their nature is that they are "*either, on the one hand noticeably flattering or deferential or approbatory or obsequious or, on the other hand, noticeably disparaging or deprecatory or insulting or humiliating* (2015:3)". While this description seems to include inegalitarian cases listed above, it involves emotive words, such as "insulting" or "humiliating", so it does not offer us a guidance as to how we can make an objective judgement about whether a relationships or system is egalitarian or inegalitarian. This leads us to ask a further question of when people are entitled to make a claim that they are insulted or humiliated. Scheffler has analyzed the conditions under which we feel respected in personal relationships in general, which helps us resolve this issue. According to Scheffler, "to express respect for persons" can be equated with recognizing

[5] Runciman (1967), Miller (1997), Wolff (1998), Anderson (1999), Schemmel (2011).

the other as a free and responsible agent and to respect and value the other's relevant interests adequately. The property that makes relationships egalitarian is the presence of what he calls Egalitarian Deliberative Constraint:

> **Egalitarian Deliberative Constraint (EDC):** each of our equally important interests constraints our joint decisions to the same extent (Scheffler, 2015: 25).

According to this formulation, if two people stand in an egalitarian relationship, then one has a disposition to treat the other's major interests as playing just as significant a role as his. These two people's interest joinly and equally constrain their decisions. One have a reciprocal disposition with regard to the interests of another. In addition, it is assumed that two parties are disposed to act on the decision made through this decision-making process. My failure to act this way entitles you to the feeling of humiliation or being insulted.

Is EDC specific enough? Scheffler claims that attempts to create a formula of the equal relationship that is more precise than EDC are doomed to fail, because relating to others as equals is a complex interpersonal practice that heavily depends on the context. I believe that Scheffler is right on this point. For instance, it might be argued that decisions must be made jointly by the agents involved in the relationship for this relationship to be egalitarian. Suppose, however, that there are some situations in which one agent makes a justifiably one-sided decision for the best interest of the other agent. Cases of justified paternalism may be considered as examples to this. Furthermore, Shuppert proposes to test the utility of this definition by applying it to pragmatic cases, such workplace relationships, rich-poor relationships, and gender relationships, all of which may include both objectionable and unobjectionable aspects (i.e. morally speaking, these relationships are not always inegalitarian), and then examining whether it distinguishes between objectionable and unobjectionable cases properly. He reaches the conclusion that it is indeed a

useful definition which can be used as the criterion to identify the cases which are compatible or incompatible with relational equality.

Notice, however, while this strategy of going case-by-case is valid for interpersonal relationships, it cannot be simply applied to the societal level, because there are some crucial differences between the ways in which face-to-face relationships and impersonal social relationships operate. While we can communicate our personal interests with each other, this cannot be done at a societal level. Under the realistic assumption that a society consists of a large number of people, we as members of it cannot communicate with each other face-to-face, nor can we obtain individualized knowledge about the needs, preferences, and values of distant fellow members or do we possess means to equalize treatments that we consider as objectionable except by large-scale collective action. These characteristics of a society entail that relational egalitarians face the need to think in terms of responsibilities borne by societal institutions, particularly government, in order to ensure that people in a society can satisfy the EDC and prevent the establishment and reinforcement of inegalitarian relationships between individuals and groups of individuals.

2.1.3. Why Relational Equality, rather than Distributive Equality

While the idea of relational equality may be clarified in the above section, it still remains unclear why relational equality is a better conceptualization of equality than distributive equality. After all, distributive egalitarians could agree with everything that has been said so far and still claim that EDC-sensitive relationships are relationships in which certain social goods are distributed in a fair manner. If this argument is true, then relational equality converges on distributive equality. Hence,

my aim of this section is to clarify the distinctiveness of relational equality and show that distributive egalitarian theories fail to account for objectionable cases for which relational egalitarian theories provide explanations.

Let us begin with the Titanic case provided by Debra Satz (2010)[6]: when the Titanic sank, there were enough lifeboats only for the first-class passengers. The lower-class passengers were expected to drown with the ship, and in fact many of them did. I believe that most of us consider this to be morally objectionable. The question we face is, then, what exactly is unjust in the Titanic case? Distributive egalitarians might try to explain its injustice by arguing that the distribution of opportunity (i.e. access to the lifeboats) was inegalitarian. However, it is not very clear why the distribution was inegalitarian, given that the first-class passengers were willing to pay for the lifeboats in addition to their passages on the ship.[7] This leads to another possible argument by distributive egalitarians that the initial distribution of income and wealth was unjust and the injustice of the Titanic case is a consequence of the unjust distribution. Yet, this argument is not an adequate expalantion either, because we can imagine that all the passengers had the same level of social goods and a certain group of people were expected to drown simply because they belonged to a racial group treated as inferior. While this is only a hypothetical counter-example, cases like routinely arise.

What is unjust about this case, then, seems to be that the lower-class passengers were considered not worthy of being saved and their interests were not counted at all. This explanation

[6] Note that Satz has employed this example for a different purpose. The case was used to demonstrate that "general egalitarianism which seeks to remedy distributional inequalities that market create by using a tax-and-transfer system" fails against "specific egalitarianism" which require that particular goods not be distributed through market at all, even when blocking exchanges in these goods is inefficient. The example was adopted to our discussion nevertheless as it highlights the strength of relational egalitarian theories.
[7] This was the case, according to Schelling (1984).

fits the relational egalitarian idea that relationships in which EDC is not maintained is unjust, and it points to the fact that the structure and character of interpersonal relationships cannot be described solely by distribution. Anderson rightly pointed out that inegalitarianism historically referred not so much to distributions of goods as to relations between superior and inferior persons, and what we found objectionable about cases, such as racism, eugenics and sexism, is social orders based on "*a hierarchy of human beings, ranked according to their intrinsic worth* (Anderson, 1999: 312)" . Anderson's argument seems to be well in line with the Titanic case.

The Titanic case sheds light on another weakness of distributive egalitarianism. Distributive egalitarian theories, such as Rawls's and Dworkin's, argue that the question of justice and equality applies primarily to social institutions rather than to individual and group agents. But this claim is open doubt, as the Titanic case suggests, for there are apparently inegalitarian situations in which social and political institutions do not play a role. Moreover, the narrow focus on social and political institutions can be seen as illiberal, as citizens are represented as objects of treatment by their government rather than participants of collective action.[8]

There is yet another aspect of equality which distributive egalitarian theories fail to take into account. This point has been made by Christian Schemmel. To briefly recap his argument, let us begin by considering Thomas Pogge's "V-Case" (Pogge 2003; Schemmel, 2011). The case considers five scenarios in which a group of innocent people lack a vital nutrient V. The scenarios are the following:

[8] Scheffler (2003) makes the claim that Dowkin's equality of resources presents the government as the active subject while its citizens as the mere objects of equalization in which way, according to Scheffler, it endorses a a relationship of domination.

1. There is a law that bans the members of this group from buying food containing V. So, the shortfall of V is legally mandated.
2. Sellers of food containing V can legally refuse to sell the products to members of this group. So, the shortfall is legally authorized.
3. Members of this group are poor and cannot afford to buy food containing V. The shortfall is foreseeably and avoidably engendered by social institutions.
4. There is a law that bans sellers of food containing V from refusing to sell the products to members of this group, but enforcement of the law is weak, and so sellers still refuse to comply with it. So causing the shortfall by discrimination is legally prohibited but the law has no deterrent force.
5. Members of this group are handicapped by the same genetic defect that prevents them from metabolizing V. There is treatment for this deficiency, but it is inaccessible to them. So, the shortfall is due to a lack of efforts on the part of society to mitigate the effects of a natural defect.

These five scenarios are ordered according to the level of injustice they entail: scenario 1 is more morally objectionable than the scenario 5, Pogge suggests. Schemmel shares Pogge's intuition, and so do I; to say that scenario 1 is as unjust as scenario 5 is very counterintuitive.

Distributive egalitarians, however, cannot account for the differences between the five scenarios. Schemmel claims that outcome egalitarians[9] must admit that the five scenarios are equally just because the outcomes are the same in them (i.e. people to whom the access to V is denied by the law experience the same level of deprivation as those whose lack of access is due to

[9] In the text, Schemmel does not explicitly differentiate *outcome* and *procedural* egalitarianisms but I believe that this claim is specifically targeted at outcome egalitarians.

not receiving help from society). Procedural distributive egalitarians[10] do not fare better at addressing the differences of scenarios. Schemmel envisages three objections that they might level to him. First, it can be argued that the state *caused* the shortfall of V in the more unjust scenarios, while the state *let it happen* in the less unjust scenarios. He answers that this distinction does not readily apply to a state because "*the standards of justice is not a special responsibility a state has on top of its personal life….it is its very purpose of existence* (2011: 130)".[11] Second, the differences might be explained by reference to whether the shortfall of V is caused naturally or socially. This explanation is also unsatisfactory, in Schemmel's view, as it fails to distinguish between scenario 3 and scenario 4. Finally, as Cohen claimed, distributive egalitarians might maintain that distribution and treatment of individuals concern two different spheres of justice, and therefore, it is wrong to explain the differences among the five scenarios in terms of treatment alone. Schemmel's response is that relational egalitarianism unites the two spheres. Consequently, it has greater explanatory power than than Cohen's pluralist approach to egalitarianism which suggest that the claims of the two spheres need to be balanced on a case by case basis. I do not think, however, that this is a convincing reply because despite the fact that relational equality unites the concerns for treatment and equality, there are other values, not consisting in that of equality, and relational egalitarians still face the task of balancing equality with these. They can avoid confronting this task only if they are ready to make the following two assumptions: first, that all concerns of justice are reducible to equality, and second, that justice never competes with other values. But perhaps one can put the argument against Cohen in a different way. One might argue that relational equality and distributive equality are just two aspects of the same thing. An example

[10] Again, Schemmel does not explicitly characterize these objections as claims by *procedural* distributive egalitarians and not outcome distributive egalitarians. But it seems fairly clear that the arguments focus on the procedural differences of the distribution in the V-case.
[11] This argument is also pushed forward by Nagel (1991).

could be Dworkin's theory of equality of resources: equality of resources is reached by the auction in which each individual participates on equal terms. Distribution belongs to the same sphere of equality as treatment of individuals. So the advantage of relational egalitarianism does not consist in avoiding the task of balancing, but rather integrating distribution and treatment of individuals within the same unified conception.

To summarize, relational egalitarians can provide an explanation for why the respect expressed in scenarios 1 to 5 differ in degrees (in the ascending order) which in turn is due to the different levels of injustice treatment that generates the same unjust deprivation. In Schemmel's terms, from the scenario 1 to the scenario 5, the attitude[12] of the state gradually moves from *hostility* to *contempt* to *neglect* (2011: 135).

Thus, the major weakness of distributive egalitarianism is that it cannot account for the intrinsic moral importance of the way distributions are socially produced. There is more to social and political institutions' treating citizens with equal concern than distribution: respectful or disrespectful treatment of individuals also matter, and the justice or injustice of distributions is inseparable from it.

The objective of this section is not to discard the importance of distributive equality, or to argue that it is only the equality of social relations that matters. Relational egalitarianism is not indifferent to the pattern of distribution of social goods. In fact, it is deeply concerned about it. I believe that this is for two reasons. First, some distributive patterns can be inherently inegalitarian in the relational sense. For instance, poverty may cause shame and prevent the poor from

[12] One might wonder whether it is plausible to think that institutions can have attitudes and expressions. Drawing from existing scholarship on collective action, Schemmel claims defends that it is, on the ground that individuals involved in a collective intentional action conceive themselves as engaged in a common enterprise and the common engterprise generates claim on the members to act in certain ways for its maintenance. For a detailed account, refer to Anderson and Pildes (2000).

participating in social activities that are considered as important. In such cases, it can hardly be said that the poor is on equal standing with the rest of the members of the society.[13] A similar argument can be made for the scenario 5 of the V-case. Although the scenario 5 is *less unjust* as compared to other four cases, that does not make the scenario *just*; it is still unjust from a relational egalitarian point of view to the extent that people lacking V might not be able to participate in society.

Second, distributive patterns are instrumental to establishing and reinforcing relational equality or inequality. An example is a means-tested benefit system. Studies on social secury system reveal that means-tested benefit systems that target low-income households lead to generate a feeling of antagonism toward the poor among higher-income groups and to political polarization (Skocpol, 1991). Such distributive policies ought to be avoided from the point of relational equality.[14] Relational egalitarianism, therefore, introduces constraints on the ways in which distribution is done; it demands that distribution should not express, establish, or reinforce inegalitarian and hierarchical relationships between individuals or groups of individuals. I further explore the distributive implications of relational egalitarianism and specify what distributive principles are compatible with it later in Section 2.3.1 of this chapter.

[13] There is empirical proof that poverty causes shame and subsequently forces the poor to withdraw from the society. For details, refer to Walker (2014).

[14] Of course, the policy choice betweee universal benefits and means-tested benefits must also consider efficiency. It is also empirical proven that a means-tested benefit system are not any more cost-efficient because its administrative costs which is absent in a universal benefit system. It is called "the pradox of redistribution". (Korpi and Palme, 1998).

2.2. Varieties of Relational Egalitarianism and Defense of Justice-Based Pluralist Relational Egalitarianism

The description of relational equality I gave in the previous section was based upon two assumptions. First, relational equality is a demand of justice and it is not merely a good that we are better off with. Second, relational equality constrains distributive patterns. In other words, distributive principles cannot be identified without the notion of relational equality. These two assumptions are not consensual among relational egalitarians, hence it is my aim in this section to explain why I think that relational equality is best explained with these assumptions in mind rather than without them.

2.2.1. Varieties of Relational Egalitarianism

The first step towards distinguishing types of relational egalitarianism is to see whether the theory in question takes relational equality to be a demand of justice. Let us call the theory that does make this assumption *justice-based relational egalitarianism,* and the one that takes relational equality to be a value other than that of justice *justice-independent relational egalitarianism*. The second step is to look to justice-based conceptions of relational equality and examine how different such accounts treat issues of distribution. In so doing, we will distinguish three different types. The first type is what I would call *partially justice-based relational egalitarianism*. Conceptions within this category take equality of social relations to be partly a matter of justice, but they also assume that sometimes equality is a value of a different nature. Such conceptions may agree that sometimes, inequality is unjust, but another time it is bad but not unjust. The second type is *justice-based pluralist relational egalitarianism*. Pluralist relational egalitarianism maintains that equality is a matter of justice, but as such it is not a single value. Inequality is just or unjust not in itself but a

part of a larger group of values such as fairness and reciprocity. Whether it is just or unjust depends on the way it affects these other values and is affected by them. It is in this sense that this conception is "pluralist". Both the partially justice-based account and the justice-based pluralist accounts argue that distributive principles cannot be determined independently of relational equality: the justice of distributive outcomes depends on whether the social processes of distributions are compatible with relational equality. Scheffler, for instance, rejects luck egalitarianism on the basis of the argument that luck egalitarian principles cannot be applied in practice without institutions making intrusive and disrespectful inquiries into personal choices and preferences, and are likely to issue in negative public assessments of people's character traits. While his EDC does not fully specify the way egalitarian relations and distributions can be distinguished from inegalitarian ones[15], Scheffler believes that this is not necessary. So according to him the luck egalitarian theory wants to reach a goal that one should not want to achieve in the first place. The last type is *justice-based monistic relational egalitarianism* which also conceives equality as entirely a demand of justice. It disagrees with the pluralist account, however, and claims that justice can be reduced to equality or justice is equivalent to equality, and thus, when equality is achieved, justice is achieved. This account requires that relational equality, as the only justice-related value, entirely determines the process and outcome of distribution. The four types of relational equality can be summarized as follows:

1. ***Justice-Independent Relational Egalitarianism***: relational equality is a social ideal that is independent of justice. [16]

[15] This is so because distribution is not an issue solely of equality. As pluralism of justice-related values is assumed, the ideal distributional process and outcomes need be determined in accordance with other values as well as equality.
[16] Among justice-independent realtional egalitarianism, one can also make the differenciation between the monist and pluralist accounts, as I have done so with justice-based relational egalitarisnism. This distinction is, however,

2. Justice-Based Relational Egalitarianism

2a. ***Partially Justice-Based Relational Egalitarianism***: relational equality is partly a matter of justice, but equality might also be a value of a different nature.

2b. ***Justice-Based Pluralist Relational Egalitarianism***: Relational equality is a value that is solely dependent on or derived from justice. Justice encompasses multiple values, including equality and fairness and so on. These values constrain each other and must be balanced.

2c. ***Justice-Based Monistic Relational Egalitarianism***: Relational equality is entirely a demand of justice, and justice can be reduced to equality or justice is equivalent to equality, and thus, when equality is achieved, justice is achieved.

In the next section, I consider these accounts in greater detail with the aim to show that of all accounts of relational equality, the justice-based pluralist account is the most plausible one.

2.2.2. Defense of Justice-Based Pluralist Relational Egalitarianism

Let us start with the justice-indepdenent relational egalitarianism. The prominent proponent of this account is David Miller, who has clearly argued for drawing a distinction between equality and justice (1997a; 1997b). Here is a quotation from Miller that shows that his account is puzzling:

> There are two different kinds of valuable equality, one connected with justice, and the other standing independently of it…..Suppose for instance that we wanted to argue in favour of reducing

unnecessary for our discussion because what we would like to clarify here is the implications of different relational egalitarian accounts on distribution. As justice-independent relational egalitarianism treats equality as completely separate from justice, equality has no implication on distribution in this account.

> the income inequalities that exist in contemporary liberal societies. If we took our stand on distributive equality, we would try to show that those currently receiving higher incomes had no just claim to them…..If, on the other hand, we invoked social equality, we would argue that income differences on the current scale unavoidably translated themselves into social divisions (Miller, 1997: 224).

I believe that whether we accept some relational or distributive theory of equality, we will not think that income inequalities should be reduced merely because we are good people if we do so but because we bear an obligation to do so. But if this is indeed an obligation rather than something supraobligatory, then I find it difficult to see why equality is not a requirement of justice. Moreover, it seems that Miller acknowledges that relational equality is based upon the presumption of equal moral status of persons (Miller, 1997a; 1997b). In addition, he claims that distribution ought to be grounded in fairness. These two claims together make his view even more open to doubt, since they seem to imply that equality is indeed an issue of justice. For the importance of fairness arises from the presumption of equal moral status of persons, as shown by Rawls (1999) and others. In other words, if the fairness principle applies to distributions, and if it applies to distributions ultimately on the ground that people have an equal moral status, and if the importance of relational equality is also grounded in the presumption of equal moral status, than relational equality is also a matter of justice. So Miller should explain why relational equality should be seen as independent of justice *despite* of his sharing the presumption and its implications. We have a prima facie reason to consider relational equality to fall within the domain of justice, not outside it.

Reasons can be raised against partially justice-based relational egalitarianism as well. In order to establish a fully justice-based account, all of the inegalitarian relations that relational egalitarians seek to rule out must be reasonably characterized as injustice. Mason claims that this

is impossible (2015). He invites us to imagine the following case: a person decides not to shop at a local store run by a person who belongs to some ethic minority and instead goes to another shop run by a person of his own majoritarian ethnic group. He makes this choice because he considers this ethnic minority as inferior to his group and he does not want to give him custom to them.[17][18] He claims that while this man's behavior might make us feel morally uncomfortable as it involves a failure to respect members of the ethnic minority as our moral equals but it far-fetched to claim that it is unjust. As his argument is heavily based on intuition, however, the ground of his argument is quite weak, because others, myself included, do not share it and have a very different intuition. Therefore, Mason needs to provide a reason why his intuition is true and the intuition to the contrary is mistaken. His account is incomplete unless it explains why some cases of inequality are unjust while others are not. It seems to me that Mason fails to do this, and so his distinction is arbitrary. Moreover, there is a strong positive reason for accepting the opposite intuition. Mason's view is based on the assumption that not entering the shop of the despised ethnic minority's member does not harm him. In answer, we could appeal to Kant's categorical imperative. Perhaps if I alone avoid shopping with him, he does not suffer any harm. There might be enough others to buy food with him. But the categorical imperative demands me to consider what would happen to the shopkeeper if every majority individual would avoid his shop. In this case, he would suffer a great harm. So my action is not something which should make me feel uncomfortable. My action cannot be universalized, and therefore it is unjust and morally impermissible.

[17]He offers a list of examples similar to this one to appeal to our intuition. The local store case is only one of the examples, but it suffices to consider this example alone here as it is exemplary enough. For the details of these example, refer to Mason (2015).

[18] While the store keeper loses the benefit from this man's custom, it is assumed that there is no unjust effect of this behavior, for the sake of argument because our purpose is to investigate whether relational egalitarian can account for this case indepdently of its effect.

Before moving on to the justice-based monistic relational egalitarianism, I would like to very briefly summarize Schemmel's arguments (2015) as I believe that they can be brought up against justice-independent and partially justice-based relational egalitarianism. He criticizes what he calls PRE[19] on the ground that it has a perfectionist conception of goods. Perfectionism is illiberal because the broad aim of liberalism is to enable individuals to pursue the widest possible array of different conceptions of good. Furthermore, according to Schemmel, the perfectionist effort to secure goods would be oppressive because it inevitably requires citizens to sacrifice their personal goods for the sake of some impersonal value with which they might to agree. I find these claims to be convincing arguments against liberals who insist on the justice-independent and partially justice-based accounts.

Finally, I contend that justice-based monistic relational egalitarianism is also implausible. I can illustrate my point by appealing to the so-called leveling-down objection. This objection was originally raised against distributive egalitarianism rather than justice-based monistic relational egalitarianism, but I think that it can be extended to the latter. According to it, sometimes inequality can be reduced only by requiring the better-off to give up goods and rendering them as badly off as the worse-off is without, without making the worse-off better off (Temkin, 1993). This objection can be applied to the justice-based monistic relational egalitarianism. Justice-based monistic relational egalitarianism insists that the concern of relational equality stands free of any other concerns, and it alone determines what distributions are just. Suppose that relational equality demands leveling down of the better-off even if the worse-off is not benefited. This is morally unappealing, but the monistic account would be hardly able to explain why we should avoid such

[19] His arguments are made against what he calls Pluralist Social Egalitarianism (PSE) which commits itself to the premise that relational equality is based on multiple values in addition to, or other than justice. Hence, PSE includes justice-independent and partially justice-based relational egalitarianism.

a change in the position of the better-off. The pluralistic account can avoid this implication because of its insistence that that the value of equality depends on how it fits other values. If welfare belongs to the relevant values, then leveling down does not follow from this version of relational egalitarianism.

These arguments leave us with justice-based pluralistic relational egalitarianism as the only account of relational egalitarianism that can be sustained. As I have briefly mentioned above, this account has specific implications on distribution: relational equality *constrains* the process and outcome of distribution by demanding that the EDC is satisfied, without fully *determining* them.

2.3. Complex Equality as an Approach to Relational Equality

The purpose of this section is to establish that complex equality is an approach to relational equality. The discussion in Chapter 1 and 2 combined, I believe, makes it evident that complex egalitarians and relational egalitarians share the same ideal of relational equality. The next step required for the fulfillment of my purpose is to show that the strategy of distribution recommended by Miller and Walzer (i.e. the separation of spheres) is compatible with justice-based pluralistic relational egalitarianism. As I have just indicated in the end of the last section, justice-based pluralistic relational egalitarianism constrains the process and pattern of distribution. At this point, it is not clear what kind of distributive principles are compatible with such constraints. Thus, I clarify the criteria that distributive principles must meet in order to satisfy the demand of justice-based pluralistic relational egalitarianism. In the course of this discussion, I show that the separation of spheres is one of these criteria. Hence, my conclusion extends further than the claim that complex egalitarianism is compatible with relational egalitarianism. It concludes that complex

egalitarianism is an account that relational egalitarians must include in their principle of relational equality.

2.3.1. Relational Egalitarian Constraints on Distribution

I ended Chapter 2.1.2. with the illustration of differences between the nature of personal relationships and society and by stressing that due to the anonymous nature of society, social and political institutions bear the responsibility to ensure that EDC is maintained in the society. This is the point where relational egalitarians start tackling the question of distributions, as distribution is one of the social arrangements that affect the equality or inequality of relationships. To establish the criteria that distributive principles must meet for the ideal of relational equality to obtain, I begin by sketching out the useful discussion between Schemmel and Anderson. Throughout this section and the next one, I argue that Schemmel is right to claim that Anderson's sufficientarian principles are incompatible with relational equality.

Anderson, in her very influential article "*What is the Point of Equality?*", suggested a conception of the way relational egalitarianism defines standards for distribution of goods. She says that according to relational egalitarianism, individuals must be adequately endowed with material assets in three dimensions: in their well-being as individual persons (food, shelter, health, etc.), in their capacity as participants of cooperation (education, etc.), and in their capacity as citizens, as participants of democratic politics (equal rights and opportunities to express their views, etc.). Schemmel (2011) rightly points out that Anderson's discussion implies that relational egalitarianism reduces distributive justice to a minimalist, sufficiency view. There are at least two reasons, according to Schemmel, why relational egalitarians should reject such sufficientarianism

as an account of distributive justice. First, given the Rawlsian view that members of a society as a cooperative venture for mutual advantage between free and equal persons standing in relationships of reciprocity with each other (Rawls, 1990), there is a prima facie reason to distribute goods equally among them.[20] In other words, the socially produced advantages and disadvantages must be allocated equally in order for social and political institutions to express equal concern for the good of every member of society. This is called *presumption of equality*. Second, there is an instrumental reason against unequal distribution that distributive inequality gives rise to unjust social relationships as advantages and disadvantages tend to happen in cluster which in turn enable advantaged individuals to dominate the disadvantaged. For instance, a person in a high-income household can afford better education than a person in a low-income household, which in turn makes the labor market more accessible for her. This is the same thing Walzer had in mind in speaking about congruence of advantages and disadvantages in difference spheres of distribution.

I would like to add in support of Schemmel's criticism of the sufficientarian implications of Anderson's view that Anderson's view rests on an implausible view of a society. In "*What is the Point of Equality?"* and elsewhere (Anderson 2009), Anderson equates relational equality with democratic equality. She claims that democratic equality is "*a kind of standing in civil society to make claims on others, that they respect one's rights, pay due regard to one's interests, and include one as a full participant in civil society, including those that inform democratric governance* (2009: 219)." Now consider the following claim: "*democracy helps avoid some of the evild of undemocratic ways of life. It helps secure individuals against abuse, neglect, subordination and pariah status* (2009: 219)." This seems to me to suggest that Anderson assumes that once

[20] It should be stressed that it is only a prima facie reason and therefore if there are justice-relevant reasons for denying such distribution then unequal distributions can be justified.

democratic decision-making is in place and citizens are capable of participating in the process, their rights and interests will be adequately respected by other members of the society, and relational equality will obtain. This is why relational egalitarianism implies, in her view, a sufficientarian view of distributive justice.[21]

I agree that a decision-making process where each participant has an equal say and can communicate sufficient information about their personal interests is likely to establish *interpersonal relationships* in which EDC is maintained. However, the same is not true at the societal level. Let us recall our discussion in Chapter 2.1.2. of the differences between the ways in which face-to-face and large-scale, impersonal social relationships operate. Drawing on Scheffler, I have argued that given the anonymous character of society, members do not have individualized knowledge about the needs, preferences and values of fellow members. This still remains true for a society with a democratic government. Therefore, democratic decision-making is not sufficient to make sure that the EDC is adequately respected in society. Thus, as Scheffler (2015) and Schemmel (2011) righly claim, relational egalitarians should accept a *presumption of equality* as a prima facie principle of egalitarian distribution.

2.3.2. The Need for the Separation of Spheres for Relational Equality

Is the presumption of egalitarian distribution sufficient for the ideal of relational equality to obtain?[22] Should there be other constraints? Let us consider what goods are necessary for

[21] Anderson claim does not entail that distributive principles must be sufficientarian *all things considered*. Again, relational egalitarianism only constrains distributive processes and outcomes rather than determines them.

[22]Schemmel further argues that distribution is the most promising policy approach likely to ensure relational equality. Here is my counterargument: As mentioned above, relational (in)equality is conveyed through norms of social status which include, among other things, attitudes and evaluations. It is hardly conceivable that distributive patterns alone can rule out objectionable norm of social status. Some inegalitarian attitudes and expressions will not be properly

individuals to establish egalitarian relationships with other individuals and their social and political institutions. Anderson's list of such goods, while it may not be complete, provides us with a helpful starting point.[23] The list includes goods that allow individuals functioning as 1) a human being, 2) a participant in a system of economic cooperation, and 3) a citizen of a democratic state. Such goods include: food, shelter, clothing, medical care, access to education, access to the means of production, freedom of occupation, freedom of speech and the franchise, and so on and so forth (Anderson, 1999).[24] For Anderson, these are sufficiency conditions. I have already dealt with this aspect of her views. Here, I want to point to a different aspect of the list provided by her. Some of the goods on the list are commodities, others are rights and liberties. If this is so, and if the state bears responsibility to ensure that its arrangements maintain relational equality among citizens, [25] then it seem that the state is morally required to secure not just material good but other goods such as rights and liberties to its citizens. The former are *commodifiable*, the latter are *non-commodifiable* goods. Commodifiable goods can be exchanged for other values, non-commodifiable goods should not. One should not exchange one's rights and liberties for other advantages. I think this is also true about commodifiable goods insofar as they are minimal conditions of human subsistence. The basic goods necessary for relational equality are non-

characterized by claims that these should simply be equalized. To make this point more concrete, let us imagine a case of a society consisting of three people, A, B, and C. A and B belong to the same racial group and C belongs to another. The social goods are equally distributed. If A and B address C with contempt and hate because of C's skin color, it seems that there is strong relational inequality while there is nothing more to be distributed. Schemmel's claim might be that empirically speaking, such expressions and attitudes cannot exist independently of inequalities of social goods. However, I argue that there is, at least, a reason to doubt the claim as it is not empirically established. Hence, besides distribution, other forms of prevention/remedies are needed to restore relational equality.

[23] This statement does not contradict with my argument that Anderson's sufficientarian principles are incompatible with relational egalitarianism. I.e. the claim that relational egalitarianism requires individuals to posess the goods in Anderson's list does not entail sufficientarian distributive pattern. This is so because, as I argued in the previous section, having these goods and thereby being able to participate in the society alone does not gurantee that EDC are respected.

[24] As my purpose in this section is to existence of different spheres of distribution, there is no need to come up with a complete list. A proxy would be enough for this purpose. Therefore, although such an attempt will undoubtedly be a valuable contribution to the scholarship on relational egalitarianism, it is a topic of discussion for another day.

[25] Relational egalitarians would indeed claim that the state bears such responsibility, as mentioned in Chapter 2.1.2.

commodifiable goods. The state ought to prevent such goods from becoming objects of market exchange.

It follows that relational egalitarianism must assume multiple spheres of distribution – at least two, the spheres of commodifiable and non-commodifiable goods – each of which is subject to a distinct distributive principle. While this idea of spheres is slightly different from Walzer's original definition of sphere as a set of social practices, with associated customary beliefs, values and expectations, the difference does not harm my argument. First, I have suggested that we abandon Walzer's version of complex egalitarianism, and second, my approach is close to Miller's definition. As a liberal (rather than a communitarian), Miller argues that distribution is subject to normative principles, and those principles are not reducible to empirical social norms. Miller suggests that the demarcation of spheres is regulated by the distinctiveness of the distributive principles applying to each family of goods.

Considering this, I suggest that, in addition to the presumption of equality, relational egalitarianism should include the idea of separation of spheres in its account of distributive justice. Furthermore, I contend that the idea of the separation of spheres is in fact necessary for relational egalitarianism, because it is practically impossible for members of a community to establish egalitarian relationships unless the non-commodifiable goods are guaranteed to them independently of how they succeed on the market. As the separation of spheres is the essence of complex egalitarianism, my argument implies that relational egalitarianism necessarily includes the idea and norms of complex egalitarianism.

2.3.3. Miller's Complex Equality Revised

I made a number of points in this chapter, so I end this chapter by reasserting my important points and clarying that I have established that complex equality is an approach to relational equality.

In Chapter 2.1.1, the ideal of relational equality was explained. Combined my explanation of complex equality in Chapter 1, it has become clear to us now that both relational egalitarians and complex egalitarians are committed to the same goal – what Miller calls 'equality of status' and relational equality defined as interpersonal relationships and society where EDC is maintained are equivalent with each other. Through Chapter 2.1.2. to 2.1.3 I have defended relational egalitarianism through ciritques of distributive egalitarianism. This was done to establish that relational egalitairianism is a valuable doctrine who deserves attention from egalitarians and so is complex egalitarianism as a version of relational egalitarianism. Chapter 2.2. was entirely used to defend justice-based pluralistic relational egalitarianism through critiques of other kinds of relational egalitarianism. This step was necessary, partially to strengthen the claim that relational egalitarianism is a plausible ideal, but mainly to clarify the distributive implications of relational egalitarianism. Finally in the previous chapter, 2.3., I have illustrated how the idea of the separation of spheres can be integrated into relational egalitarianism.

These discussions in Chapter 2 have made it clear to us that Miller's account of complex equality cannot straightforwardly be adopted by relational egalitarians. Miller needs to abandon the justice-indepent idea of equality and adopt the justce-based pluralist account instead. Also, he needs a revision to his demarcation of spheres of distribution, using the suggested commodifiability criterion. Despite these two major modifications Miller must make, I still claim that complex equality is an approach to relational equality, as the very essences of complex egalitarianism – its ideal of equal relationnships and the idea of the separation of spheres – are still maintained in the modified theory, and these essences were shown to be integral and necessary elements of complex egalitarianism.

Chapter 3 Defense of Complex Equality Against Arneson's Critiques

Having argued for complex equality as an approach to relational equality, I examine the critiques that Richard Arneson provided against Walzer and Miller (1995). As none of them has given a response to these critiques, it is important for the purpose of this essay to refute them and demonstrate that the theory of complex equality does not face fatal objections. If my refutations are successful, then there is reason for relational egalitarians to consider complex equality as a strategy to achieve their aim. Arneson provides a number of points but they can be generally categorized into five types of claims.In the following sections, I summarize and critically analyze each of these five claims one by one.

3.1. The Intrinsic Value of Relational Equality

As mentioned above, non-dominance and equality of status are at the core of relational egalitarianism that consideres these values as intrinsic values, and this is true about complex equality too. Arneson, however, denies this. He argues that equality of status is value-neutral. It has only instrumentally values to the extent that it contributes to people's well-being. In other words, it is good or bad depending on their effects on people's welfare. His reason for this claim is two-fold. First, social life is full of examples of competition, and status competitions seem to have both positive and negative effects. While losers of the competitions might feel debilitated, there are also winners who benefit, and thus there is no prima facie reason to think that competition is debilitating for the overall utility or welfare. In addition, he claims that many goods well worth having are essentially or contingently the object of competitive striving.

A number of ways can be taken in order to respond to this objection. The first way is to say that this argument is simply built upon a false understanding of the theory of complex equality. As I have discussed in Chapter 2.1.3., Arneson misinterprets the theory of complex equality and suppose that any status competitions are regarded as objectionably by Walzer and Miller. This is simply not the case, as the aim of relational egalitarianism is to establish relationships and societies in which EDC is maintained, rather than abolishing all status competitions, and the theory of complex equality is a type of relational egalitarian theories, which shares the same aim. With this specification of its aim, complex egalitarianism (or, relational egalitarianism in general) escape the claim that it is over-demanding. Similarly, to claim that some goods worthy of possession are essentially or contingenty the object of status competitions also fails undermine complex egalitarianism (or, relational egalitarianism in general). If these goods are generated, exchanged, or distributed through ubobjectionable status competitions, then there would be nothing problematic about them for complex egalitarians.

The second response is that this objection fails because the argument is question-begging. Notice that he starts with the empirical observation that status competitions could increase or decrease welfare and immediately move to the conclusion that relational equality is a neutral value that can be instrumentally valuable or harmful for the attainment of welfare. This conclusion does not hold, however, without a premise that welfare is the ultimate value, so this argument can be regarded as implicitly assuming this premise. Then, the conclusion that relational equality is a non-intrinsic value and something else is intrinsically valuable is already assumed in this premise, for which Arneson does not provide justification.

Relational egalitarians can also respond to Arneson by embrasing a position that a good can have final value without being intrinsically valuable. This is a position developed by

Korssgaard (1983) and later adopted by Mason (2001) and Moss (2009) in the context of discussion about the value of equality. Korsgaard makes a distinction between two types of values. In her view, intrinsic value and extrinsic value[26] should be constrasted with each other on the one hand, while final value[27] and instrumental value[28] should be contrasted with each other on the hand. In other words, it is wrong to conceive the counterpart of intrinsic value is instrumental value. This entails that something can be extrinsically valuable but not be merely instrumental. An example of a good of such value might be art. If a life which includes engaging with art is part of what it is to lead a good life, then art is a non-instrumentally valuable part of a good life. Similarly, if relational equality is what it is to be well off, then relational equality is non-instrumentally valuable part of a good life, and it does not have to be given a lower priority when it conflicts with another values just because the latter are more instrumentally effective to welfare.

Finally, let us again go back to Pogge's V-case in chapter 2. Now we add an assumption to the case that in all five scenarios, the group of people that suffers from the lack of the nutrition V do not know why the cause of this deficiency. So they do not know if the government has intentially blocked their access to V or if the deficiency of V was naturally caused (say, by genetic problems) and unintended by the government. Because they do not know how they are treated by the social institutions and they lack V in all five cases, their level of well-being is exactly the same.[29] Despite this consistency of level of welfare, there still seems to be differences in the levels of injustice from the scenario 1 to the scenario 5. Therefore, even if the above-mentioned responses to the objection fail, it can be said, at very least, that it very counterintuitive to think that there are

[26] what is valued is valued because of some other source of value
[27] where what is valued is valued because of some other source of value
[28] where what is valued is valuable as a means
[29] Here it is assumed that the knowledge of how one is treated has an influence on the level of well-being, and that is the reason for adding this assumption to this case.

no differences between the five scenarios and Arneson's claim that equality or inequaity of status matter only insofar as they affect the level of wellbeing[30] fails.

3.2. The Plausibility of Separations of Spheres

The second type of critique is a challenge to the empirical plausibility of the separation of spheres. According to Arneson, the argument that complex equality obtains if congruence of advantages and disadvantages in different spheres is blocked is simply groundless as it only engages with a counterfactual situation and does not provide the explanation as to why exactly this blocking is feasible. Arneson's claim is appealing considering how widespread the congruence of inequalities spheres is across the societies today. Indeed, it is difficult to imagine a strategy for separation that is morally unobjectionable, because separation seems to make the pattern of distribution insensitive to the notion of desert and personal responsibility, thereby violating the demand of fairness. It is also insensitive to individual ambitions. As Dworkin persuasively claims, distributive patterns should be arranged in a matter that allows people equal opportunities to strive to satisfy their ambitions. To make this point clear, imagine that we try to separate the sphere of education and the sphere of income. How is it fair to prevent individuals who earned more income than others genuinely through their efforts rather than arbitrary means are from investing more in their children's education? Hence, the burden of proof lies on the side of Walzer and Miller.

[30] Elsewhere Arneson also critiques the value of equality on the ground that it demands too much; if relational equality is morally mandated, most of the institutions we belong to, such as government agencies, business, firms, and non-profit organizations, would be considered unjust as they require subordinations to manages which are hierarchical in nature (2009). However, as I have argued in Chapter 2.1.2 in this essay, to identify the demand of relational equality as elimination of status differences is misleading and what needs to be ruled out instead is social status norms that fail to consider EDC. Thus, subordination to managers at workplace would not be considered objectionable insofar as the manager's interests are adequately constrained by the subordinate's interests.

I claim that while Walzer and Miller is faced the burden of proof, complex egalitarians who adopt the definition of spheres spheres that I have suggested above, the sphere of commodifiable goods and the sphere of non-commodifiable goods, escape Arneson's objection. This distinction of spheres do not imply that different types of advantage or disadvantages can never be congruent. The case of using one's income for his children's education, in this view, is not a problematic case of congruence.

3.3. The Conceptual Link Between Complex Equality and Relational Equality

Thirdly, Arneson goes on to argue that the suggested link between the separation of spheres and non-dominance is dubious. This is so because Walzer's premise that in each sphere, goods must be distributed according to criteria that conform to their social meanings entails that the hierarchy in a sphere is permissible if people attach such a meaning to a sphere. Arneson provides an example of feudalism to elicit the reader's agreement. The distribution of honor and status under feudalism was such that certain modes of domination, i.e. relational inequality, were culturally approved. Therefore, Arneson argues, the separation does not prevent inequality.

My reply to this objection will be brief because I think my arguments in Chapter 1.3. already responds to his critique. In Chapter 1.3., I have argued that Walzer's communitarian assumption is implausible for the precisely same reason that Arneson provided. But I suggested that we can alternatively adopt Miller's liberal understanding of complex equality rather than Walzer's communitarian one, and that the existing communal understandings of goods should not be adopted as distributive criteria if they violate the fundamental liberal values (i.e. equal moral

status). Thus, although Arneson's critiques applies to Walzer's communitarianism, it leaves intact the liberal theory of complex equality.

3.4. The Freedom from the State's Domination

The fourth critique is aimed at the connection between complex equality and the freedom from the domination by the state. Walzer assumes simple equality need to be maintained by continuous government intervention while complex equality is self-enforcing, and therefore, it ensures the prevention of state's infringement of individual freedom to act in ways that shift outcomes away from an initial distribution in which everyone has the same share by an appropriate measure. However, it is not clear to Arneson why this is likely; as complex equality requires each sphere to be autonomous, and so state intervention seems to be surely necessary for the separation of spheres. Also, it is questionable, according to him, whether a distribution in each sphere is feasible without an authority that intervenes and resolves conflicts when there are overlapping jurisdictional claims.

In my view, Walzer is indeed wrong to think that complex equality is self-reinforcing. But the fact that complex equality requires state intervention is not detrimental to the theory. Here is the reason: Arneson interprets Walzer as if he defended another version of Nozick's libertarian objections to state interventionism. However, Walzer's concers are different. He opposes simple equality on the ground of his claim that people should be free to live according to their cultural norms. So, Walzer is not opposing state interventions simpliciter; rather, he is opposing particular type of state intervention that force people alter their social understandings of goods. Whether or not he is right in wanting the state to respect commuinal cultural understandings, he certainly does not reject state intervention generaly on libertarian grounds.

3.5. Conflicts between Relational Equality and Other Values

Finally, Arneson criticizes Miller's argument that there is no trade-off between equality of status and Parteo-optimality conflicts with the egalitarian ideal. I quote:

> Suppose for the sake of argument that we succeed in identifying an X which fits the 'equality of X' formula and which captures our basic concern for equality: it matters fundamentally to us that people should be equal in their shares of X. Suppose, also, however, that starting from an equal distribution X, it is possible to engineer a strongly Pareto-improving change, i.e. to move to a situation in which shares of X are unequal, but in which everyone has more X than in the original condition of equality. If we are fundamentally concerned about people's share of X, how can we fail to applaud a change which increases everyone's share of X while at the same time breaking the equality? (Miller, 1995: 202 -203)

Miller insists that such a conflict is absent in complex equality and this feature of complex equality makes it superior to distributive equality. Arneson argues, however, that there is no reason to think that such conflict does not arise for complex egalitarians because insisting on relational equality alone leads to leveling-down.

I believe that Arneson's reply to Miller is right: complex egalitarians also face a conflict between relational equality and the Pareto-optimality. However, it is not detrimental to complex egalitarianism. Let me recall our discussion in Chapter 2.2. Complex egalitarians escape the conflict if they adopt justice-based monistic relational egalitarianism because justice is reduced to

equality in this account.[31] However, I have argued that this account cannot be sustained because it would face the leveling-down objection, just as Arneson argued. I have suggested that we alternatively adopt justice-based pluralistic relational egalitarianism which takes equality as one of multiple values that refer to justice. As multiplicity of values is assumed, this account necessarily faces a need to make a prioritization of values.[32] What we can draw from this discussion is that while complex egalitarianism does not escape value conflicts, this does not make it inferior to monistic theories which do not face conflicts simply because the value monism is not well founded.

[31] Although justice-independent relational egalitarians conceive equality as a value independent of justice, I believe that they still face the value conflict because they have to choose equality and justice and explain why one ought to be prioritized to another.

[32] This prioritization need to be either theoretically established or done case by case. Whether the theoretical approach is possible is out of the focus of this essay.

Conclusion

It is a concern for us in our day-to-day lives, how others treat us by their words, attitudes, and behavior. If we are offered monetary compensation in exchange for social exclusion, we might accept the offer, but the deep-seated feeling of being morally wronged does not disappear, and the monetary compensation does not make the insult just. Complex egalitarianism is a doctrine that helps us to explain this intuition. Walzer and Miller suggested that the point of distributive justice is to secure an equal status for all, and, that equal status cannot be secured by simple distributive equality. It requires complex equality instead. Their claim did not take hold, however, and distributive egalitarianism continued to dominate the scholarship.

Given the recent rise of relational egalitarianism, which shares the same relational idea of equality with complex egalitarianism, this essay has investigated whether the doctrine of complex equality can survive as a version of relational egalitarianism. Throughout the investigation, I relied on Miller's liberal complex egalitarianism as Walzer's communitarian approach is, as I have suggested, untenable. I hope to have shown that, despite the need for a modification of its view on the link between equality and justice, the essences of Miller's theory – the relational conception of equality and the separation of spheres – can be maintained, and it can enrich relational egalitarianism. This is so because the separation of spheres of distribution is a constraint on distribution necessary to prevent the rise of inegalitarian relationships. Thus, complex equality must be integrated into relational egalitarianism.

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