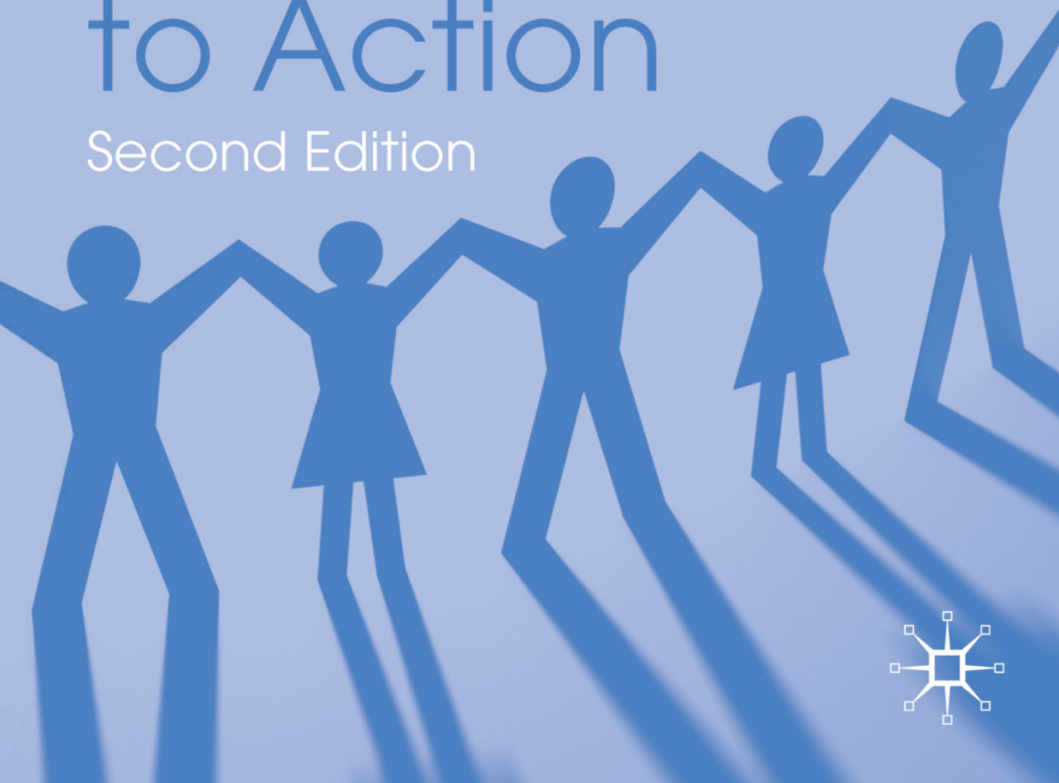


John Baker, Kathleen Lynch,
Sara Cantillon and Judy Walsh

Equality

From Theory to Action

Second Edition



‘This is a truly extraordinary book, combining sophisticated philosophical discussion of the fundamental moral issues linked to equality with solid sociological analysis of existing institutions and how they work to generate inequality, and provocative political analysis of strategies to transform those institutions...It provides a powerful framework for a new egalitarianism for the 21st century.’

– **Erik Olin Wright**, *Vilas Distinguished Professor of Sociology, University of Wisconsin, Madison, USA*

‘The book is astonishing in its scope.’

– **Jonathan Wolff**, *Professor and Head of Department of Philosophy, University College London, UK*

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The authors have also been active in a wide range of equality-related organizations and campaigns.

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From Theory to Action

Second Edition

John Baker
Kathleen Lynch
Sara Cantillon

and

Judy Walsh

*Equality Studies Centre, UCD School of Social Justice,
University College Dublin*

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Preface

When the Equality Studies Centre at University College Dublin opened its doors in 1989, the prospects for equality looked bleak. It was a period of economic retrenchment in Ireland and of right-wing ascendancy in Britain and the US. The fall of communism in the USSR and central and eastern Europe made capitalism seem triumphant. In the academy, it was fashionable to dismiss an interest in equality as a 'grand narrative' of a bygone era. But resistance to inequality and domination has been a perennial feature of human societies and was never destined simply to disappear. In the last decade it has resurfaced on a global scale. Our aim in this book is to contribute to that struggle for equality. We want to show how cooperation across academic disciplines and among groups seeking egalitarian change can help to strengthen not just the theory of equality but its practical implementation and its political prospects.

We could never have written this book without the experience we have gained in the Equality Studies Centre. Most importantly, it has brought us into dialogue with the hundreds of activists who have enrolled on our postgraduate and outreach programmes out of a desire to reflect upon their own experiences of working for equality and to deepen their understanding of the issues they faced. We cannot overstate what we have learned from them and from the movements and organizations to which they belong. The existence of the Equality Studies Centre has also made it possible for us to interact with and learn from a wide number of other groups and individuals interested in egalitarian change. And it has given us the opportunity to learn from each other and from our colleagues associated with the Centre, with our different disciplinary and personal backgrounds.

It would therefore be truly impossible to name everyone who has contributed to this work. But we wish especially to thank our colleagues Alpha Connelly, Mary Kelly and Máire Nic Ghiolla Phádraig, who were involved in the research project from the start and shaped its overall conception and agenda, as well as our students and colleagues Carlos Bruen, John Bosco Conama, Maggie Feeley, Tarig Yousif, Mary McEvoy, Henry McClave, Pat McDonnell, Susan Miner, Maurice Murphy, Phyllis Murphy, Maeve O'Brien, Deiric O'Broin and Mary O'Donoghue, with whom we discussed a number of chapters and from whose own work we have learned a lot. We are also very grateful to many people for their generous comments on one or more chapters, including Chris Armstrong, Valerie Bresnihan, Harry Brighouse, Vittorio Bufacchi, Alan Carling, G.A. Cohen, Niall Crowley, Laurence Cox, Jurgen De Wispelaere, Marc Fleurbaey, Andrew Glyn, Keith Graham, Bernie Grummell, Niamh Hardiman, Ellen Hazelkorn, Iseult

Honohan, Cathal Kelly, Peter McDermott, Eithne McLaughlin, Mags Liddy, Ger Moane, Eadaoin ní Chleirigh, Shane O'Neill, Francis O'Toole, Anne Phillips, Andrew Sayer, Richard Sinnott, Bob Sutcliffe, Jennifer Todd, Louise Walsh, Tanya Ward, Gerry Whyte, Jonathan Wolff, Erik Olin Wright and Gillian Wylie, as well as participants in Equality Studies and Politics courses; we apologize to anyone whose comments we have overlooked. We also want to thank participants on occasions at which parts of this book were tried out, under the auspices of the American Political Science Association (1996), Queen's University Belfast (1996), the Political Studies Association of Ireland (1999, 2003), the UCD Politics Department (1999), the Tenth Anniversary Conference of the Equality Studies Centre (2000), the Fifth Summer School on Economics and Philosophy (San Sebastian, 2002), the Havens Center for the Study of Social Structure and Social Change (University of Wisconsin – Madison, 2002) and the Seamus Heaney Lectures (St Patrick's College, Dublin, 2003). This research was generously funded by The Atlantic Philanthropies. It also received institutional support from the Institution for Social and Policy Studies at Yale University (1998–99) and the Department of Politics, the Faculty of Interdisciplinary Studies and the Institute for the Study of Social Change at University College Dublin.

We would like to dedicate this book to our diverse families, from whom we have had object lessons in all of the dimensions of equality.

Earlier versions of various chapters or parts of chapters appeared as follows: Chapter 1: John Baker, 'Studying Equality', *Imprints* 2 (1997), pp. 57–71 and Iain MacKenzie and Shane O'Neill, eds, *Reconstituting Social Criticism* (Basingstoke: Macmillan – now Palgrave Macmillan, 1999), pp. 51–64. Chapter 2: John Baker, 'Equality', in S. Healy and B. Reynolds, eds, *Social Policy in Ireland: Principles, Practice and Problems* (Dublin: Oak Tree Press, 1998), pp. 21–42. Chapter 3: John Baker, 'Equality and Other Values', *Studies* 92 (2003), pp. 113–21. Chapter 9: Kathleen Lynch, 'Equality Studies, the Academy and the Role of Research in Emancipatory Social Change', *Economic and Social Review* 30 (1999), pp. 41–69.

Writing this book has been a genuinely collective enterprise, and the authors take joint responsibility for its contents. We wish to acknowledge primary responsibility for particular chapters as follows: John and Kathleen for Chapters 1, 2, 4 and 10, John for Chapters 3, 6 and 12, Kathleen for Chapters 8, 9 and 11, Sara for Chapter 5 and Judy for Chapter 7.

Preface to the Second Edition

Since it took us many years to produce the first edition of *Equality: From Theory to Action*, it will come as no surprise that we are not yet ready to engage in a major reworking of this book. Within the text we have simply taken the opportunity to undertake some very minor amendments to the first edition. In this preface we respond to some of the comments that have been made about the book and then discuss briefly some of the ways that our thinking has developed since it was first published.¹

Responses to the first edition

Although reviewers and commentators have been generous in their reactions, they have raised several sets of issues that are worth responding to. The first concerns our limited focus, which was always on problems of inequality within well-off democracies. Our material is drawn largely from the experience and thinking of Ireland, Britain and the United States, although we also cite literature and evidence from many other countries. Undoubtedly this affects our perceptions and commitments, but since every author writes from a particular personal and intellectual experience and from a necessarily limited knowledge, all we can do is invite our readers to engage their experience with ours and make their own judgments as a result of the encounter. A related issue is the relative lack of attention we give to issues of imperialism, globalization, global inequality and global governance, even though these are often acknowledged in the text. In this case, it is not so much an issue of writing from a particular perspective, since everyone's experience is framed by global issues, but simply of not being able to talk about everything at once. As the opening pages of Chapter 1 indicate, it is perfectly possible to describe the many dimensions of global inequality, and in our view the theoretical frameworks set out more generally in Part I are as applicable to global as to national issues. The main normative question here is whether the ideal of equality of condition set out in Chapter 2 is justifiable as a conception of global justice, while the central empirical questions are how to apply the framework elaborated in Chapter 4, of four contexts of egalitarian change, at a global level and how to explain their interaction with more localized systems. A considerable amount of relevant work is being done in both of these areas and we fully acknowledge that such work is a necessary supplement to what we say in this book.

A rather different aspect of limited focus concerns the social groups that we have chosen to concentrate on as illustrations of equality issues. As

Chapter 1 indicates, the key social divisions that we return to repeatedly are class, gender, 'race' and ethnicity, disability and sexual orientation. These are the divisions that are particularly prominent in our own experience and therefore, again, reflect our situated perspective. What some commentators have found surprising is that the example of racism we concentrate on is the treatment of Irish Travellers rather than that of non-whites. This is indeed a specific case, and it is importantly distinct from forms of racism that are marked by skin colour. However, we believed and continue to hold that it is both analytically and politically important to resist the view that racism only arrived in Irish society during its recent experience of net immigration, and we hope that readers in other countries will see both parallels and differences when they compare their own experience with what we say about racism and anti-racism in Ireland.

Despite our limited focus, many commentators have remarked on the breadth of the analysis here. As they have also pointed out, the price of breadth is sometimes lack of depth, and we acknowledge that on almost every question addressed in this book there is much more to be said and many difficult questions to answer. Since one of the central aims of the book is to exhibit the scope and coherence of equality studies as a field of inquiry, breadth was always going to have a high priority, and as a result we have often had to condense material. But we do not believe that we have over-simplified – that we have chosen breadth over accuracy. We have tried to be open about the many issues on which there is room for disagreement and for further analysis. We have also tried to deepen our own understanding of equality issues through further research. An area that we have been particularly concerned to understand is affective equality, and we draw on some of that work, as published in *Affective Equality: Love, Care and Injustice*, below.²

Part I of this book sets out our general theoretical framework, at the core of which is a commitment to what we call equality of condition, defined in terms of five dimensions of equality. But a number of thoughtful critics have suggested that we pay too little attention to the possibility of conflicts between different egalitarian goals. For example, it is sometimes argued that the celebration of cultural diversity is incompatible with a belief in gender equality, since some cultural norms are inimical to equality between men and women. Difficult choices need to be made, choices that the framework set out in Chapter 2 is claimed not to address. Our general answer to this criticism is to accept that in particular circumstances egalitarian aims may well be incompatible, and that choices do need to be made. The framework in Chapter 2 is not intended to rule out hard choices but to identify the range of principles that egalitarians can endorse, a range that has often been too narrowly construed. Yet although specific circumstances may force us to choose between egalitarian aims, our general position is that these circumstances arise most sharply in situations of severe inequality, and that

therefore the practical task of making societies more equal also helps to alleviate the burden of choosing between egalitarian aims. In our view, the equalities constituting equality of condition are far from incompatible, and in fact reinforce each other. So, to return to the example, the conflict between celebrating cultural diversity and promoting gender equality arises most sharply in societies marked by gender inequality and the marginalization of cultural minorities, where such minorities are put on the defensive by dominant cultural traditions and by processes in the economic, political and affective systems that reinforce inequality. Greater economic, political and affective equality, together with a practice of what we call critical interculturalism, would, we think, promote both equality of respect and recognition and equality between men and women.

In Part II, we discuss the institutional and policy implications of equality of condition. We have always considered our views to be contributions to a broader egalitarian programme that is being developed all over the world by both researchers and activists. A number of people have suggested ways in which the ideas we put forward could be modified or supplemented. For example, our discussion in Chapter 5 focuses primarily on the distribution of earned incomes, and so says little about the very important issue of the distribution of wealth. The main point we would continue to stress about institutions and policies is the importance of looking at effects across all of the dimensions of equality. A change that generates greater equality of income may look very different in terms of its effects on work, power or love and care.

In Part III, we address political strategies for advancing the equality agenda. We point to a range of egalitarian movements and their combined potential for achieving social change. Some commentators have suggested that our stance is too optimistic – that there are too many divisions and conflicts among seemingly egalitarian movements to foster the kind of cooperation and common aims that are essential for political progress; indeed, that it is mistaken to talk of a shared equality agenda at all. We, in turn, think that these critics are too pessimistic, and in particular that they may not have fully appreciated the value of what we call strategic pluralism. There are of course many important differences among and within egalitarian movements, but these are not necessarily obstacles to changes in the broad direction of greater equality of condition.

Developments in our thinking

In the five years since this book was first published, and in the longer period since most of it was written, there have been substantial changes in Irish and global society. Within Ireland, the main change has been the substantial increase in the number of non-Irish nationals living in the country. Although Ireland has been a country of net immigration since 1996, the

expansion of the EU in 2004 led to a substantial jump in immigration in 2005. The first edition did recognize migration as an equality issue, but it has become a much more salient one and would now deserve more attention. At a global level, the continued economic growth of China and India has had an effect on global inequality, the invasion of Iraq has highlighted many equality issues, and the global capitalist economy is in crisis. Although we do not give much attention to global inequalities, these developments would affect some of what we say in passing. Another global factor that has become much more prominent in recent years is global warming. Although the first edition does refer to global warming, it does not receive an extended treatment. Now that it is much more familiar in public discourse, it could be used to develop the ideas on the relationship between equality and the environment set out in Chapter 3. Although everyone is affected by global warming, the fact that some are better placed to protect themselves than others is an important and perhaps under-recognized fact.

At the centre of this book is the conceptual framework set out in Chapters 2 and 4. Chapter 2 puts forward a multi-dimensional analysis of three conceptions of equality, called basic equality, liberal egalitarianism and equality of condition, and outlines their application to social groups. Chapter 4 sets out four main contexts of equality, namely the economic, cultural, political and affective systems.

In relation to the framework set out in Chapter 2, we would not yet propose any major changes. We continue to find the framework useful both in thinking normatively about equality and as a heuristic tool for empirical research. A number of relatively minor amendments now suggest themselves, however, particularly in relation to the dimension of love, care and solidarity, which we are continuing to conceptualize and to explore empirically. These are dealt with at greater length in *Affective Equality*, but broadly speaking they have to do with the scope and complexity of this dimension of equality. Although we always recognized that love, care and solidarity identify a family of related ideas rather than a single type of relationship, it is only in *Affective Equality* that we have analysed the differences in some depth, pointing out in particular some important differences between what we call primary caring relationships or love labour and what we call secondary and tertiary relationships. Another development has to do with the scope of this dimension of equality. In the first edition, our emphasis was on the positive: the value to people of relations of love, care and solidarity. We did not, in retrospect, give sufficient thought to their negative counterparts, such as violence, abuse, hatred and antagonism; our tendency was to treat these as issues of power rather than of love and care. Yet if there is an inequality of care between those who receive it and those who do not, there is clearly an even greater inequality in the same dimension between those who are cared for and those who are abused. We should therefore think of the range of the dimension of love, care and solidarity as extending in two directions and not just in one.

Within the dimension of respect and recognition, the main addition we would now make is to include liberal multiculturalism as a species of liberal egalitarianism. The more individualized idea of respect for persons clearly remains the dominant position among liberal egalitarians, and this led us in the first edition to confine group-based positions to the category of equality of condition. But 'multiculturalism' as it is understood in contemporary political discourse belongs much more to a liberal than a radical egalitarian mindset, because it emphasizes the toleration of difference rather than critical engagement. The criticisms that many liberal egalitarians have made of multiculturalism, based on its tendency to privilege the protection of cultures over the interests of individuals, motivated the group-sensitive but critically engaged understanding of difference that we meant to capture in the idea of critical interculturalism. But in the process the idea of multiculturalism itself dropped off of our map.

In the dimension of resources, our thinking has been informed by research and discussion in the Equality Studies Centre, which has often focused on particular contexts and social divisions. This has helped us to see more clearly that what counts as a valuable resource in one context is not necessarily valuable in another, and that characterizing and empirically investigating inequalities of resources is far from straightforward when dealing with resources like social and cultural capital. *Affective Equality* also pays attention to the idea of 'emotional' and 'nurturing' capitals, which refer both to external networks of support and internalized capacities. The idea of resources was always intended to be open-ended, so we are (naturally enough) inclined to see all this as confirming the fertility of the framework rather than its limitations.

In the dimension of power, the main issue that has emerged through our recent discussions has to do with the distinction between power over someone and the power to do something, a distinction common in the literature on power. Although from the point of view of the analysis of inequality, power over others remains central, not every inequality in the power of individuals or groups to do something is a case of power over; nor are such inequalities always reducible to the other dimensions of inequality, such as inequality of resources. The distinction between the two ideas of power comes particularly to the fore in relation to groups that are contesting subordination, where the ideas of personal and collective empowerment are important.³

We have also come to recognize a need for expansion in the dimension of working and learning. One might ask, for example, how it applies to the context of older people living in nursing homes. Some of them may not 'work' in any conventional sense; they may feel that they have learnt all they need to know. Yet their lives are still filled with activity – or inactivity – that can be satisfying and fulfilling or boring and stultifying. An analysis of inequalities in nursing homes would, among other things, consider the degree to which their residents have access to satisfying activities, making this question a further aspect of the dimension of working and learning.⁴

Chapter 4 of this book sets out a model of society in terms of four social systems: the economic, cultural, political and affective systems. Although the first three of these systems have been extensively investigated by social scientists, scant attention was paid to the affective system and its constituent inequalities before these were focused upon by feminist scholars, mostly since the 1980s. Even now, after at least two decades of scholarly attention, issues to do with love, care and solidarity and the work that goes into sustaining them are largely confined to branches of academic disciplines that are labelled as 'feminist' or 'radical' rather than being recognized as central issues. The theme of affective equality has still to become truly integrated into mainstream sociology, education, economics, law and political theory.

The aim of *Affective Equality* is to help to redress this imbalance. It is primarily concerned with the empirical analysis of equality within one aspect of the affective system, focusing on other-centred (primary care) relations: that sphere of social life that is primarily oriented to the care of intimate others. At its centre is a series of studies of primary care relations involving thirty Care Conversations and two focus groups, together with three further studies of mothers' emotional work in education, men's perception of masculinity and caring, and the relationship between care and literacy learning among people who had spent their childhoods in institutional care. It examines inequalities in the distribution of love and care labouring and, to a lesser degree, in the receipt of love and care. It also demonstrates inequalities of respect and recognition, of resources and of power in caring relationships and links these to the inter-relationships between inequality in the affective system and those in the economic, political and cultural systems. It reveals the depth and complexity of inequalities in the affective system and how these are shaped by key social characteristics, particularly gender, class and family status. Finally, *Affective Equality* draws attention to the primacy of loving care in life, and of the work that is involved (mostly for women at this time in history) in love labouring. It highlights the centrality of nurturing relationships to personal identities and provides extensive evidence showing how 'care-full' citizens are threatened and undermined by the lack of material supports, time and respect afforded to their labour in an increasingly 'care-less' public sphere.

We wrote *Equality: From Theory to Action* for many reasons, but most especially to contribute to the movement for egalitarian change. Four years after its publication, we remain committed to that aim, and we continue to hope that this book can help to achieve it.

Notes

1. The responses in the next few paragraphs are motivated by reviews by Faith Armitage (*Feminist Review* 82 (2006)), Sandra Lilburn (*Australian Journal of Political Science* 40 (2005)), Uvanney Maylor (*Pedagogy, Culture and Society* 13 (2005)), Ronaldo Munck (*Irish Journal of Sociology* 14 (2005)), Harriet Samuels (*Feminist*

- Legal Studies* 13 (2005)) and Steven R. Smith (*Imprints* 9 (2005)); a review symposium in the *British Journal of Sociology of Education* 26 (2005) with contributions from Tuula Gordon, Kevin Brain and Ivan Reid, and Kari Dehli; a symposium in *Res Publica* 13 (2007) with contributions from Harry Brighouse, Joanne Conaghan, Cillian McBride and Stuart White, with a reply by ourselves; and discussions with a range of colleagues, students and activists.
2. Kathleen Lynch, John Baker and Maureen Lyons, with Sara Cantillon, Judy Walsh, Maggie Feeley, Niall Hanlon and Maeve O'Brien, *Affective Equality: Love, Care and Injustice* (Basingstoke and New York: Palgrave Macmillan, 2009).
 3. The issue of empowerment is at the centre of Shari McDaid, 'Power, Empowerment and User Involvement in the Public Mental Health Services in Ireland' (PhD thesis: University College Dublin, 2008).
 4. We are grateful to Errollyn Bruce for this point.

Part I

The New Equality Agenda

1

New Challenges to an Unequal World

Inequality is a pervasive fact of our world. Yet in every country there is resistance to power and privilege, with people working at many levels to create more equal societies. What is equality? What would more equal societies look like? How can they be brought about? Those are the questions that have shaped this book. We treat egalitarianism as a practical project of developing new ideas, restructuring social institutions and achieving social change. We do not claim to answer all of the questions egalitarians need to ask, but we hope to show how these questions – and some of their answers – fit together within a coherent overall framework.

In this chapter, we review some of the obvious and not-so-obvious inequalities that exist in the world generally and in western, ‘developed’ societies in particular. We look at some of the responses they have generated from social movements, states and educational institutions. We go on to explain the general perspective from which we address equality and inequality in this book, the perspective of equality studies. The chapter ends with a guide to the rest of this book.

An unequal world

All of us live in unequal societies in an unequal world. It would be a mammoth task to survey this inequality fully and systematically.¹ But a brief glance at some of the inequalities we are all familiar with is a useful starting point for what follows.

What stands out most sharply in the world as we find it is massive inequality in the life prospects of the rich and the poor. Life expectancy ranges from 49 years in Sub-Saharan Africa to 76 years in the OECD.² Of every 1000 children born in these two groups of countries, 174 die before their fifth birthday in Sub-Saharan Africa compared to 14 in the OECD (UNDP 2002, Table 8). These facts are stark reminders of global inequality. In every country the privileged have longer and healthier lives than the worse off. ‘Unskilled’ workers in the UK are three times as likely to die from

heart disease and four times as likely to die from lung cancer as professionals (Acheson 1998, Table 2). African Americans are eight times as likely as whites to die from homicide (Keppel, Percy and Wagener 2002). These differences in how people's lives turn out reflect a range of inequalities in their circumstances – in the conditions of their lives.

Inequalities of resources

The most extensively researched inequalities of condition are those to do with income and other economic resources (Figure 1.1). A simple way of measuring income inequality is to compare the best-off tenth of the population with the worst-off tenth. In the United States, for example, the best-off tenth – the best-off 29 million people – have incomes of roughly 17 times those of the worst-off tenth. Income inequalities vary considerably among countries. In South Africa and Brazil, two of the most unequal countries, the best-off tenth of the population receive about 65 times as much income as the worst-off tenth. In the most equal countries, such as Finland and Japan, the ratio is only about five to one (World Bank 2003, Table 2.8). If we compare the best-off tenth of the *world's* population with the worst-off tenth, the figures show that those six hundred million best-off people receive about 60 times the income of the worst-off six hundred million (Sutcliffe 2002, p. 37). That is to say that global inequality is roughly of the same order as in the most unequal countries in the world.

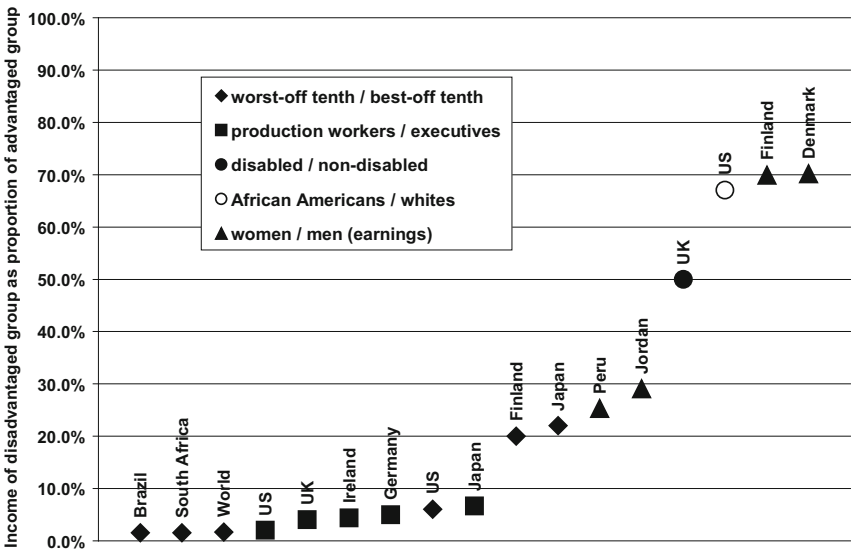


Figure 1.1 Selected inequalities of income

Sources: see text

Income inequality has several recognizable patterns. The most obvious is that income reflects social class. The richest people in the world, for example the 500 or so dollar billionaires (Kroll and Goldman 2003), belong to a class whose income derives almost entirely from investment. Among people who might loosely be called employees, there is a marked difference between the incomes of managers and workers, although this varies among countries. The average pay of high-level executives in Japan is around 15 times that of a typical production worker. In Germany the corresponding figure is 20, in the UK 25 and in the US 50 (Kenworthy 1995). The figure for Ireland³ is 23 (Cantillon *et al.* 2001, p. 14).

In every country, men receive more income than women. In the most equal countries, like Denmark and Finland, women's share of earned income is about 70 per cent of men's. In the most unequal, like Jordan and Peru, women's earnings are less than a third of men's (UNDP 2002, Table 22). Another common pattern of inequality is its connection to 'race' and ethnicity. In the US, African American families receive on average less than two-thirds the income of non-Hispanic white families (Henwood 2002). Income inequality also reflects disability. The incomes of severely disabled people in Britain are only about half of average income, after taking account of the extra costs of impairment (Burchardt 2000).

Although income inequality is particularly obvious, there are other inequalities of resources. There is a resource inequality between the 1.2 billion people who have no access to safe drinking water and the people who do (UN 2002, p. 3). It is a resource inequality that health spending per person in Ireland and the UK is roughly 13 times as much as in Ecuador and Vietnam (WHO 2001, Annex Table 5). These and many other inequalities of resources are of course usually associated with inequality of income but may include a substantial amount of collective provision.

Inequalities of respect and recognition

Inequalities in people's relations of respect and recognition are harder to quantify. There are some clear expressions of unequal respect, such as the fact that gay sex is illegal in more than 80 countries (ILGA 2003) or that there are at least 140 000 rapes or attempted rapes every year in the US (Bureau of Justice Statistics 2003). But the main expressions are more qualitative. One of the earliest issues addressed by the contemporary women's movement was the way that everyday speech privileges men over women. The use of male pronouns to refer to persons generally, the derogatory terms used by men to refer to women, the way that assertive behaviour gets praised in men but disparaged in women and the cautious ways that women are taught to express themselves are examples of this privileging (Baker 1979; Lakoff 1977; Strainchamps 1971; Vetterling-Braggin, Elliston and English 1977, Part III). Other movements have analysed similar features in relation to sexuality, 'race', disability and so on, giving rise to

debates about 'political correctness'. The general reaction of members of dominant groups has been to belittle the complaints of subordinate groups and to appeal to freedom of speech, as though having the freedom to talk in ways that insult others somehow makes it less insulting (Dunant 1994).

Inequality of recognition runs very deeply in many familiar settings. For example, it is an everyday practice to describe some students as 'smart' or 'brainy' and others as 'slow', 'weak', 'stupid' or 'duds', a pervasive inequality of recognition in the educational system (Lynch and Lodge 2002, pp. 71–82). Inequality of respect and recognition is also found in the celebrity culture fostered by the contemporary mass media, with status and adulation accorded to the 'stars' of selected fields of activity. This exaggeration and commercialization of the achievements of others has created an enormous gulf between celebrities – not just of sport and entertainment but of business and politics as well – and so-called ordinary people.

Inequalities of love, care and solidarity

Inequalities in people's access to relations of love, care and solidarity are also hard to quantify, but they are perfectly familiar. The most striking inequalities of this type are found where the normal expectation of love and care is replaced by its opposite, as in the abuse of children by their parents and by those who have institutional control over them. In recent years there has been an explosion of publicity over such cases, with the result that there are currently 27 000 children on child protection registers in England (NSPCC 2003).

People in prison often suffer an extreme lack of love and care. Their ties of family and friendship are severely disrupted and typically replaced by their antithesis. 'Prisons and jails in even the richest and most developed countries were plagued [in 2001] by massive overcrowding, decaying physical infrastructure, inadequate sanitation, lack of medical care, guard abuse and corruption, and prisoner-on-prisoner violence. In many countries abysmal prison conditions were life threatening, leading to inmate deaths from disease, malnutrition, and physical abuse' (Human Rights Watch 2002, p. 608; see also Foucault 1991; Stern 1998). The ill-treatment experienced by prisoners is documented by such organizations as the European Committee for the Prevention of Torture and Inhuman or Degrading Treatment or Punishment, Amnesty International and Human Rights Watch. Other groups that suffer severe loss of love, care and solidarity include homeless people, refugees and asylum seekers (Fanning, Veale and O'Connor 2001).

For most people, relations of love, care and solidarity are important sources of comfort and support in their daily lives. But these relationships are put under severe strain by many of the features of contemporary life. It is increasingly expected that all parents should be in paid work, with the result that in Britain the employment rates for fathers and mothers in

couples is 90 per cent and 69 per cent respectively. More than one and a half million people provide at least 20 hours of care per week to a sick, disabled or elderly person; of these carers, 51 per cent of the men and 26 per cent of the women do paid work as well. Yet the more flexible and family-friendly working arrangements needed by parents and carers are still not widely available, and are much more likely to be provided to professionals than to manual workers (EOC 2000). More generally, the pressure on many people to work long hours in paid employment imposes burdens on their personal relationships and limits the time and energy they can devote to loving and caring.

Inequalities of power

Inequalities of power are most obvious in authoritarian states that deny their citizens even the most basic rights. These inequalities are regularly reported by Amnesty International, Human Rights Watch and similar organizations. Their reports also show frequent abuses of power in democratic states, particularly in relation to political offences and penal systems. Another example of unequal power is the under-representation of women and ethnic minorities in national legislatures. In Europe, women make up about 40 to 45 per cent of the most equal parliaments (Norway and Sweden) but less than 10 per cent in the least equal (France, Greece, Hungary and Malta) (FCZB 2003). In western countries with substantial racial and ethnic minorities, these minorities are consistently under-represented in legislatures. African Americans make up 13 per cent of the US population but only 7 per cent of members of Congress (Amer 2003; Ethnic Majority 2003).

Unequal power exists in a wide range of settings. In the economy, the unequal power relationship between boss and worker is almost universal: it is the bedrock of the capitalist system. Inequality of power is pervasive not just in openly hierarchical organizations like armies, police forces, prisons and bureaucracies but in hospitals, schools, universities and religions. Unequal power is also a feature of families in most cultures regardless of their variations, systematically subordinating women and children to the power of men.

Inequalities of working and learning

Although work has many rewards, it is also a substantial burden for most working people. But there are large differences among both individuals and countries in the burdens of work. The best quantitative data concern paid employees, and show that 'an average worker in Hong Kong, Mexico City or Istanbul works about 600 more hours a year than her or his counterpart in Berlin or Copenhagen or Amsterdam' (Sutcliffe 2001, graph 7). Average paid working hours range from under 1400 in the Netherlands and Norway to over 2400 in South Korea (ILO 2002). Work inequalities are strongly

related to gender. Time use surveys in a range of countries show that nearly everywhere women work longer hours than men and that they generally perform between two-thirds and four-fifths of a society's unpaid work (UNDP 2002, Table 26).

Within the paid workforce, women, disabled people, ethnic minorities and other marginalized groups are disproportionately represented among the peripheral and casualized workers in all societies (Sayer 1997). While the proportion of women in professional jobs has increased (Smith 1993) women are still disproportionately represented among part-time and low paid workers (Acker 1992; Blackwell and Nolan 1990; Drew 1990; Hakim 1995). This trend is particularly evident in Ireland, where 23 per cent of all women employees work part-time compared with 5 per cent of men (Fahey, Russell and Smyth 2000, p. 264).⁴

Studies of non-monetary job characteristics have shown up very marked inequalities between different classes of workers. Jobs vary considerably in factors like dirtiness, repetitive tasks, control over one's own hours and activities and opportunities for learning. Inequalities in these features are strongly connected to gender, 'race' and class (Jencks, Perman and Rainwater 1988).

These inequalities of work are in many ways closely related to inequalities in learning. Although formal educational attainment is only one aspect of learning, it has important connections to other goods. Yet throughout the world it is simply taken for granted that there will be a pyramid of educational attainment, with fewer and fewer people completing higher levels in the education system. This inequality of educational attainment is clearly related to social class. In Ireland about 80 per cent of children with fathers in 'higher professional' occupations enter third-level education compared with only about 20 per cent of children with fathers in 'unskilled manual' occupations (Clancy 2001, p. 74). Although gender inequalities have been considerably reduced in recent years, women have a lower literacy rate than men in most societies (UNDP 2002, Table 22). 'Race' and ethnicity are reflected in inequalities of educational attainment: only about 13 per cent of African Americans have had four years of college compared with 24 per cent of white Americans (Hacker 1992, p. 234). Disabled people have also been excluded from education in many countries, making up less than 1 per cent of the third-level student population in Ireland (Hoey 2000) and only about 2 per cent in the UK and Germany (Skilbeck 2000, pp. 42–3).⁵

Patterns of inequality

As this short survey has indicated, inequality has some clear patterns: patterns that will occupy us throughout this book. Social class is a major, taken-for-granted factor in the shape of inequalities. Privileged classes have more resources, higher status, more power, better working conditions and greater access to education. Their privileges also help to protect them

against the worst deprivations of love and care although they are by no means fully secure in that regard. As we have noted, gender is another pervasive feature of inequality. Women are on the whole worse off in terms of resources, status, power, work and education than men. It is harder to judge the gender gap in relation to love, care and solidarity, except to note that women demonstrably do much more of the work involved in sustaining these relationships while at the same time experiencing greater degrees of domestic violence.

'Race' and ethnicity are strongly implicated in how inequalities are patterned in most societies.⁶ An example to which we will repeatedly refer in this book is the situation of Irish Travellers, an ethnic minority of about 30 000 people – just under 1 per cent of the Irish population. Travellers have a tradition of nomadism, and although about half of them now live in houses, the other half continue to live in caravans (mobile homes) located on roadsides or on government-provided sites of varying standards. While Travellers speak English, they also have a separate language, 'cant' or 'gammon', which is spoken among themselves. The needs of Travellers have been consistently ignored in Irish public affairs, resulting in exceptionally high levels of poverty, severe popular prejudice, an almost complete lack of influence on public policy, high levels of unemployment and low levels of formal education.⁷ Although anti-Traveller racism is distinct from the forms of racism most familiar in the UK, US and other developed countries because of the absence of a 'colour line', it shares many of the same features and results in similar deprivations.

Another social division that plays an important role in structuring the inequalities of most societies is disability, on which we accept the general lines of analysis set out by the so-called 'social' (as contrasted with 'medical') model of disability. The fundamental distinction of the social model is between impairment and disability. Impairments are the physical and psychological differences between disabled people and people with 'normal' capabilities. By contrast, disability is the process by which societies prevent people with impairments from realizing their full potential and from participating as fully as possible in activities that others take for granted. Impairment does not necessarily result in disability: for example, many people with impaired eyesight are able to participate fully in society because they have access to eyeglasses. But social institutions are often designed in ways that exclude people with impairments, the most obvious case being the way in which buildings with steps have failed to accommodate people with mobility impairments. This social exclusion – this disabling – of people with impairments generates inequalities in all the dimensions we have referred to above.⁸

A fifth social division that features repeatedly in our discussion is based on sexual orientation. In predominantly Christian societies of the sort we are most familiar with, a sharp distinction has traditionally been made

between the 'normal' practice of heterosexual relationships and 'perverted' sexual orientations towards members of one's own sex. Gay men, lesbians, bisexuals and transsexuals form a set of generally despised groups for which inequalities of respect and recognition – inequalities captured by the idea of homophobia – are central. These inequalities have legitimated discrimination, leading to inequalities of working and learning, of resources and of power. Homophobia has also had a severe impact on the opportunities of members of these groups for establishing relations of love, care and solidarity with others.

These social divisions do not exhaust the range of factors on which inequalities have been and continue to be erected. Age plays an important role in structuring inequality in every society. Differences between indigenous and settler populations are important in nearly all ex-colonial societies. Some of the factors that typically mark ethnic difference, such as language, nationality and religion, can be independently important. Other specific groups that suffer from inequality include prisoners and ex-prisoners, people with mental illnesses, refugees and asylum-seekers and economic migrants. We refer to some of the issues affecting these and other social groups in what follows. However, our aim is not to provide a comprehensive sociology of inequality but to pursue the more normative, practical questions of how to promote equality. We concentrate on inequalities of class, gender, ethnicity, disability and sexual orientation because these are divisions that are particularly prominent in our own experience and are likely to resonate with a wide variety of readers.⁹

Responses to inequality

Responses by social movements

The inequalities we have surveyed, and the catalogue of inequalities from which they are drawn, are not new, although their specific character has changed over time. Throughout history they have generated both covert and open resistance. In the modern era, resistance to inequality has been taken up by various social movements, often based on the social divisions already mentioned. Class inequality is at the centre of the labour and community development movements. Gender inequality is at the heart of the women's movement. Racism was at the core of the Civil Rights movement in the US and is the focus of anti-racist movements more generally. There are social movements in many countries centred on disability and sexual orientation. And there are movements concerned with ageism, the rights of indigenous peoples, religious equality and so on. Other social movements with an egalitarian agenda, such as the human rights movement, are not so closely tied to specific social divisions. We say more about egalitarian movements and the challenges they face in Part III of this book. But it is important to mention them here because we cannot understand the

responses by either governments or academics to inequality without recognizing that these are not the result of their own goodwill but of the resistance of subordinate groups.

Responses by states and interstate organizations

In recent years, egalitarian movements have extracted a number of concessions from governments, although these concessions have always been vulnerable to political changes and have often been reversed. The most prominent changes have probably been in the area of anti-discrimination legislation. In the US, the Civil Rights Act of 1964 was a milestone in the struggle to reverse racial discrimination. Although the attempt to incorporate gender equality into the Constitution in the form of the Equal Rights Amendment failed, there has been a considerable amount of legislation outlawing discrimination on the basis of gender. The Americans with Disabilities Act of 1990 set new standards for preventing discrimination against disabled people. Many US states passed anti-discrimination laws in relation to sexual orientation, and although some continued to criminalize gay sex, the Supreme Court declared such laws unconstitutional in 2003.¹⁰

In Europe, there has been anti-discrimination legislation at both EU level and within individual states. The EEC prohibited gender discrimination in pay from the start, in the Treaty of Rome. The biggest recent changes have been directives based on Article 13 of Amsterdam Treaty, which extended the scope of anti-discrimination law to a much wider set of grounds and in some cases a wider range of issues. Individual European states have varied in their approach to anti-discrimination legislation. In Ireland, the Employment Equality Act 1998 and the Equal Status Act 2000 consolidated and extended anti-discrimination legislation in relation to nine categories of people and established the Equality Authority and the Equality Tribunal.¹¹ In other countries, such as the UK, anti-discrimination policy is located in a set of laws dealing separately with 'race', gender and other forms of discrimination.

As we discuss in depth in Chapter 7, what is notable about most of this legislation is its concern with combating discrimination rather than with trying to achieve greater equality in the conditions of people's lives. At its best, it calls for positive action to help members of subordinate groups to access services and to compete in the labour market. But it does not challenge the inequalities of reward, power and prestige of different jobs and does little to change the social structures that produce inequality.

The laws normally referred to as equality legislation are only a fraction of the legislation that affects equality and inequality. For example, changes in tax codes and welfare provisions have profound effects on inequality of income. Tax cuts for people with high income and welfare reforms that, at best, fail to keep pace with average earnings and at worst remove support from the most vulnerable are clearly anti-egalitarian (Goodman and Shephard

2002, p. 31; Korpi and Palme 2003). Legislation that fails to control the disposal of hazardous waste has devastating effects on the environments of marginalized communities (Szasz 1994). International regulations promulgated by the World Trade Organization have major implications for the living conditions of countless people throughout the world. Of course it is impossible to generalize over all these different areas of state and interstate activity, but it would be hard to maintain that they have been strongly conducive to equality in recent years. Perhaps the most one can say is that egalitarian social movements have stopped them from being worse.

Responses by the academy

Within educational institutions, the rise of egalitarian social movements has had some positive effects.¹² The most striking advance has been the development of women's studies as an interdisciplinary field. Because it is rooted in the women's movement, women's studies has always had an interest not just in analysing the experience of women but in transforming gender relations. Both the analysis and the transformation have been differently conceived according to the different forms of feminism that have developed over the last 40 years or so. The liberal feminism found in the work of Friedan (1963) and Kanter (1977), echoing the classical arguments of Mary Wollstonecraft (1792), Harriet Taylor Mill (1851) and John Stuart Mill (1869), sees the problem largely in terms of the exclusion of women from a public sphere dominated and defined by men; the solution is to provide women with an equal opportunity to enter that sphere. By contrast, radical feminists such as Millett (1970), Firestone (1970), Brownmiller (1975), Dworkin (1981) and Daly (1978, 1984) place women's sexuality at the heart of the feminist agenda. While some have seen a solution in the development of egalitarian heterosexual relations, others have promoted lesbian separatism and a women-controlled counter-culture. Another strand of feminist thinking has its origins in the Marxist tradition and specifically the work of Engels (1845). Focusing on the issue of women's paid and unpaid labour, socialist feminists such as Barrett (1980), Mitchell (1984) and Delphy and Leonard (1992) attempt to explain the interrelationships between capitalism and patriarchy in the oppression of women, developing the Marxist concept of exploitation and applying it to the family. On this analysis, the transformation that women need extends through both the family and the economy. These brief remarks only review the types of feminism prominent in the early years of women's studies, which has continued to develop new perspectives including psychoanalytic feminism, postmodernist feminism, global feminism and black feminism. They do, however, illustrate the diversity of approaches in the field of women's studies and the interplay between the empirical analysis of women's oppression and the normative commitment to women's liberation.

Another area in which an egalitarian social movement has produced important academic developments is disability. The study of disability traditionally occurred in several disciplines but especially in medicine, psychology, education and social policy. In all of these disciplines, the disabled person was traditionally defined as the 'Other', the person whom the researcher was not, but about whom the researcher could speak. Disability was presented as a social, psychological, educational or medical 'problem' which had to be resolved. Disability studies has emerged as a space where disabled people can speak for themselves and conduct their own analysis of the ways in which disabled people are excluded and oppressed. Developing the social model of disability to which we have already referred, writers such as Finkelstein (1980), Oliver (1990) and Barnes (1991, 1996) have shifted the focus from the individual, medical condition of disabled people to the disabling structures of society. Disability studies is not yet either as clearly defined or as intellectually diverse as women's studies. However, important new perspectives have developed particularly in relation to the interface between gender and disability (Deegan and Brooks 1985; Morris 1989, 1991), the role of culture in defining and reinforcing disability (Shakespeare 1994) and the interplay of impairment and disability (French 1997).

Other social movements have developed their own academic counterparts. For example, the anti-racist movement has generated ethnic and racial studies. Queer studies has emerged from the lesbian, gay and bisexual movement. The human rights movement has stimulated corresponding academic programmes. Even in the area of development studies, which had an essentially top-down origin against the backdrop of the Cold War, solidarity movements in the North and resistance movements in the South have had a significant impact, questioning western dominance over the definition of development and prioritizing the needs and perspectives of local communities.

A common feature of these areas of study is their interdisciplinary basis, reflecting an awareness of the multifaceted nature of inequality. Another common theme is their rejection of the tendency of the social sciences to make a sharp division between the normative and the empirical and to pretend that what academics do can be detached from their moral and political commitments. It is not a question of allowing those commitments to override the attempt to discover the truth about the social world, but rather about their providing a point and direction to research and teaching. This commitment to a synthesis of normative and empirical concerns has given a new impetus to attempts to articulate a coherent and defensible moral foundation for the types of study in question and to think about the types of social transformation necessary for creating a better world.

But there is a further common feature of these intellectual developments. It is that as each of these areas of studies has grown, it has come to

recognize the importance of cross-cutting social divisions. This is most clearly marked in women's studies, where there has been considerable debate and agonizing over the suggestion that what feminist scholars were expressing in the early years was in fact the experience of white, middle class, heterosexual women living in rich countries. So women's studies has been pressed to find ways of incorporating the different experiences of women of colour, working class women, lesbians and women from the South. Similarly, feminists have complained about a gender bias in disability studies. It is clear that the same kinds of questions can be raised throughout the disciplines we have been discussing: questions about how to accommodate all the social differences that affect people's perspectives and agendas. One response to these challenges is fragmentation: to say that what we need is no longer women's studies or disability studies but a variety of studies focusing on ever more specific sets of characteristics. An alternative response is to develop an expanded set of studies that recognizes all of these issues within a coherent framework. That is what equality studies attempts to achieve.

Equality Studies as a response to inequality

The deep, patterned inequalities of our world are there for all to see. If we think that these inequalities are wrong and want to change them, it is not enough to think of them solely from the point of view of workers or women or disabled people. We need to find a way of addressing them that incorporates all of these perspectives without attempting to ignore their differences. In this section, we set out the central questions of equality studies as it has developed in the Equality Studies Centre at University College Dublin.¹³ We try to show that it is a coherent response to cross-cutting inequalities. As an interdisciplinary field that combines both normative and empirical enquiry and aims at transformation, it is similar to the fields of women's studies, disability studies and the like. What distinguishes it is its concern with the whole range of inequalities, its attempt to articulate and defend its normative commitments and its emphasis on how to achieve social change. While all of these features are to some degree present in other areas of study, they are central constituents of equality studies.

Central questions of equality studies

The central concerns of equality studies can be expressed in terms of six interrelated sets of questions. Together they set out a new, coherent field of enquiry.

1. *What are the central, significant, dominant patterns of inequality in our society, western capitalist society more generally, and, more generally still, the world at large?* An initial task of equality studies is simply to get a grip on

the scale and patterns of existing inequalities. How are income and wealth distributed among households and individuals? What are the differences in income and occupational status between men and women? How do different classes compare in access to education? Which ethnic groups are discriminated against and denied basic rights? What are the basic facts about the global distribution of resources? Who enjoys, and who is deprived of, relations of love, care and solidarity? We have cited some of the answers to these questions earlier in this chapter. Although this is essentially a descriptive task, it provides an indispensable backdrop for a wide range of egalitarian concerns.

2. *What are the best ways of explaining these inequalities, using which overall frameworks?* Contemporary social science is awash with explanatory frameworks: rational choice theory, systems theory, structuralism, post-structuralism, functionalism, hermeneutics, Marxism in its various versions, critical theory, psychoanalytic approaches and so on, each with their internal conflicts and sub-divisions. We cannot study inequality without making use of such frameworks, but there is certainly no consensus, even among egalitarians, on which of them are most helpful. So equality studies must operate pluralistically, encouraging work within different paradigms and learning what we can about the causes of inequality from each of many traditions. This part of equality studies is probably its most heavily researched area, although the explanation of inequality is sometimes hampered by disciplinary boundaries. Explaining inequality is a core concern in sociology, economics, political science, geography and the interdisciplinary fields we have mentioned above. For this reason, we do not devote much space in this book to explanatory research, although we rely on it when necessary. In Chapter 4 we do set out some of the key assumptions that we make in analysing inequality since these inform what we say in Parts II and III.

3. *What are the central principles or objectives of equality? What in principle are egalitarians trying to achieve? How strong are the arguments for and against these principles?* There are many possible conceptions of equality. It is clearly a central problem for equality studies to articulate these conceptions and explore their interrelations and relative merits. There has been a considerable amount of theoretical work in this area in the last 35 years.¹⁴ A common feature of this work is to consider the relationship between equality and other normative concerns, such as freedom, community, cultural diversity, individual well-being, sexual difference, environmental values and so on. Although there is no consensus on either the formulation or justification of egalitarian principles, it is clear that these contributions nevertheless form a distinct theoretical family.

A great deal of egalitarian theory concerns the problem of defining the egalitarian ideal: an ideal that we will call, following Tawney (1964), 'equality of condition'. It is also worthwhile distinguishing more limited

objectives that can be treated as intermediate steps to equality. Setting out an egalitarian ideal does not itself decide the case between radical and reformist political strategies, nor is it meant to distract us from urgent action to secure basic needs and other human rights. In Chapter 2, we attempt to provide a relatively inclusive framework for thinking about equality. In Chapter 3 we try to show how the framework relates to values that are not at first sight closely connected to equality.

As Sen (1992) has noted, setting out a coherent conception of equality is closely connected to setting out the case for equality so defined. That task has both a positive and a negative side. The positive side is to put forward the arguments in favour of equality, or to put it more precisely, to show why people should endorse a particular conception of equality as the right principle or set of principles for evaluating and governing our social relations. The negative side is to put the case against anti-egalitarian principles: to undermine the justifications that have been given for maintaining unequal social relationships. In this book we treat the case for equality as given. Although we occasionally mention arguments for or against equality, our concern is with questions that arise once equality is accepted as a goal. In Chapter 2 we sketch the logic of the argument that takes us from basic equality to liberal equality and from there to equality of condition. In Chapter 3 we draw connections and contrasts between equality and other values. In Chapter 5 we review evidence showing that equality is good for economic growth and efficiency. In Chapter 6 we respond to the claim that political equality is unrealistic. In Chapter 8 we review the case for equality in education. But for a full account of why equality matters, we refer the reader to other sources.¹⁵

4. *What are the best institutional frameworks for achieving equality in different spheres and contexts?* The institutional parallel to setting out egalitarian principles or objectives is to set out the case for corresponding social institutions, in the broad sense of economic and political structures, legal systems, educational systems, family forms and so on. Although there has been a tremendous amount of relevant work in this area, it has rarely had an explicitly egalitarian focus. There have been many discussions of models of socialism, and particularly of the use of markets within broadly socialist economies. But although issues about distribution usually arise at some point or other in these discussions, the egalitarian case for socialism is only given a central role by a few authors (e.g. Roemer 1994; Schweickart 1994). References to the idea of political equality are more prominent in the considerable literature on participatory democracy. Yet only a few treatments are based on an integrated conception of the role of participatory democracy in a wider egalitarian project (e.g. Bowles and Gintis 1987; Green 1985). Similar remarks could be made about work on other social institutions. Situating these discussions within an equality studies framework can help to bring out more clearly the purposes of alternative institutions and their role in a coherent vision of an egalitarian social order.

As with egalitarian principles, we can talk about both the social institutions necessary for a fully egalitarian society and other more limited reforms. The institutions of contemporary welfare states are not directed towards full equality, but do aspire to certain limited egalitarian objectives such as the elimination of poverty and the satisfaction of some basic needs. How these institutions can be reformed to achieve these limited goals more effectively is a perfectly legitimate question for contemporary egalitarians.

Because this area of equality studies is undeveloped, we have prioritized it for this book. In Part II, we discuss some of the changes equality calls for in economic, political, legal and educational institutions. Although each chapter takes up only a selection of the huge number of questions that arise, we hope that the range of institutional contexts and problems demonstrates the value of addressing these issues within an equality studies framework.

5. *Within a given institutional context, what policies would best promote equality?* Whether we are concerned with the 'utopian' question of a fully egalitarian society or the reformist question of improving the world as it stands, the state and other institutions face a range of policy options that may be more or less egalitarian. A large amount of contemporary work in social policy is concerned with this question, often in connection with limited objectives like equal opportunity and the relief of poverty. Well-known examples are debates around affirmative action and welfare reform. There is no precise borderline between major policy initiatives and institutional reform (question 4), but some issues are clearly on one side or the other. In Part II, we draw attention to the relation between broader institutional issues and more specific policy choices. For example, we note that the institutions of participatory democracy require policies on how political activity is financed. But we recognize that policy issues tend to be even more dependent on local contexts than institutional questions.

6. *What are the best political strategies for promoting equality, given our vision of equality, our understanding of the causes of inequality, and the (corresponding?) obstacles to achieving equality?* Work on egalitarian principles, institutions and policies is concerned with both the long-term goal of an egalitarian society and more immediate reforms. How are these changes to be brought about? To develop practical strategies for promoting equality, we need an understanding of social change rooted in the successes and failures of egalitarian movements. In Part III we put forward some ideas about these issues although our discussion is far from comprehensive. But if equality studies is to have any point, then these questions of political strategy are as much on its agenda as the more familiar tasks of describing, explaining and philosophizing.

The six groups of questions set out above are by no means definitive of a field that is only in its early stages of development, and they are in any case rather open-ended. For example, it might be suggested that equality studies

should explicitly include questions about the history of equality and egalitarianism, treating these as a distinct branch of enquiry. Perhaps equality studies should also highlight the question of personal transformation: what changes do we have to make in our own lives here and now if we claim to take equality seriously?¹⁶ It would be foolish to treat the six sets of questions as exhaustive, but they do establish a coherent core for the study of equality.

With such a wide range of questions to address, it is clear that equality studies has to be an interdisciplinary project that uses skills and knowledge drawn from political theory, empirical politics, sociology, education, law, economics, psychology and probably other disciplines as well. Like any co-operative project, it must operate on the basis of a certain division of labour – no one has to know everything – but it is important for its practitioners to listen to and learn from each other if their cooperation is to be as fruitful as possible. The fact that this book is the outcome of cooperation among people with different disciplinary backgrounds is intended to show both the necessity and the benefits of a cooperative, interdisciplinary approach.

But regardless of disciplinary origin, we believe that the study of equality entails a fundamental shift in how research is conducted. Egalitarians cannot be satisfied with traditional methods of research that are remote from and in many cases exploitative of the disadvantaged people academics have sought to examine. In Chapter 9 we set out an understanding of emancipatory research that involves partnership and dialogue with disadvantaged social groups. That process has had a profound effect on this book, since virtually all of the ideas we set forward here have arisen from and developed through the ongoing dialogues we have been privileged to be part of since 1989.

Equality studies aims not just to understand but to change the world. It is therefore essentially normative and sees knowledge as having a role to play in transforming social structures. As an unavoidably political form of enquiry, it is rooted in and aspires to express the understandings and priorities of egalitarian social movements. In these respects it shares many of the characteristics of, and is built on, similar projects such as Marxism, critical theory and the interdisciplinary fields of enquiry discussed above. Our aim is not to ‘convert’ practitioners in these fields to the idea of equality studies, but to show that there is a way of connecting up the work of these fields into a coherent overall project.

Guide to the rest of this book

In the rest of this book, we focus on three of the central questions of equality studies. In Part I, we concentrate on the theory of equality. Chapter 2 compares basic equality and liberal egalitarianism with what we call equality of condition, and defines equality of condition in five key dimensions.