Social Justice, Theories of Distributive Justice, and ‘Equality of What’ Debate

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Introduction

- Today, the concepts of social justice and distributive justice are prevalent not only in political society but also among the general public.

- This phenomenon can be explained from two perspectives.
  - a demand for a more just and equitable society or a demand for a fair share of social cooperation
  - relational equality or resistance to Abuse Culture
Introduction

- Reflecting this atmosphere, the subjects of social science research have also changed.
  - inequalities, quality of life(well-being), healthcare, racism, education, 2SLGBTQ+, multiculturalism, environmental abuse, inter-generation justice etc.

- In this presentation, let me examine the concept of social justice and major theories of distributive justice that provide normative guides to social science studies, legislation and drafting of public policies.
Social Justice

- an idea formed by the condensation of several important social values, beliefs, experiences and ways of thinking that emerged from the 17th to the 19th (or 20th) centuries. (Justice is a concept that has evolved throughout history)

- 17c-18c, Individualism and Social Contract Theory
- 18c, A. Smith’s Theory of Division of Labour (+Needs)
- 19c, Marx’s Structuralistic Thinking
Social Justice

- 19c-20c, New perceptions and responses to “luck”
  - Moral arbitrariness<-->moral responsibility

<Mozart and Salieri> by Alexander S. Pushkin

“오 하늘이여, 정의가 있는가? 신성한 천재성이 변함없는 사랑과 고된 노력, 열렬한 기도에 대한 대가로 주어지지 않고 게으른 방탕아의 경박한 머리를 빛내려 내려 오다니. 아. 모차르트 모차르트!”
Social Justice

- Salieri's monologue is full of anger and despair over the arbitrary nature of luck which works independently of human choice or effort.

→ How to neutralize the (arbitrary) tyranny of luck?

→ By constructing a just and fair social structure with minimal effects of luck!
Theories of Distributive Justice

“Justice is the first virtue of Social Institutions.” (Rawls 1971, 3)

“Our topic…is that of social justice. For us, the primary subject of justice is the basic structure of society, or more exactly, the way in which the major social institutions distribute fundamental rights and duties and determine the division of advantage from social cooperation.” (Rawls 1971, 3, 7)

= How should we arrange our social and economic institutions so as to distribute fairly the benefits and burdens of social cooperation?
Theories of Distributive Justice

- Three contested questions:

- To whom justice owed? free and equal citizens
- What should we be distributing?
  resources? welfare(or well-being)? primary goods?
  capabilities? freedom? political status(citizenship)?
- Should distribution follow any pattern?
  according to ideas of equality? priority? sufficiency?
  or needs? or desert?
Theories of Distributive Justice

- Liberal Theories of Distributive Justice (liberalisms)

Left

egalitarianism

high liberalism
social liberalism
welfarist liberalism

Right

non-egalitarianism
neo-classical liberalism
classical liberalism
libertarianism
neo-liberalsim
Theories of Distributive Justice

- Egalitarian liberalism
  - against inequality, or defending *justified* inequality
  - not strict equality, but more equal distribution
    -> emphasis on *reducing relative inequalities*

- Why is equality important?
  - Material and social inequality are bad *when and because they undermine individuals’ ability to live as equal citizens* who are willing to offer and abide by fair terms of social co-operation.
Theories of Distributive Justice

- Large inequalities in wealth lead to the control of media by an elite.
- The worst-off are dependent on those who are better off for a minimally decent existence.
- Inequalities give rise to particular morally problematic attitudes: servility, envy, lack of self-respect that undermine citizens’ attachment to an ideal of social cooperation.

More importantly, is inequality objectionable apart from the aforementioned side-effects?
Theories of Distributive Justice

- The principle of equality
  - It is *in itself bad* if some are worse off than others *through no choice or fault of theirs*. This badness is above and *beyond the bad effects of inequality*. (Arneson 1997; Tempkin 2001)

- But, it doesn’t explain why it is better for all to be equally well off rather than equally bad off.
  -> It requires *supplementation*. 
Theories of Distributive Justice

- (This means) A liberal egalitarian should be a pluralist who combines a belief in equality with a belief in the importance of improving people’s well-being.

- Notwithstanding their pluralism, egalitarian liberals are often subject to the leveling down objection.
  
  = There is nothing good at all in such leveling down, and therefore egalitarianism is false.
Theories of Distributive Justice

- Two responses to the leveling-down objection

- There is unfairness when some are better off than others *through no choice or fault of theirs*. This unfairness is absent when people are equally well off (or bad off), and therefore leveling down is *in one respect* good (*it’s fair!*).

- Yes, leveling down objection is a powerful objection. So, we must look out for an *alternative* to strict egalitarianism.
Theories of Distributive Justice

- Neo-classical liberalism
  - Strong defence of thick economic liberties
  - acceptance of social justice
  - ambiguous position on welfare state
  - the third way between egalitarian liberalism and classical liberalism (or libertarianism)
Theories of Distributive Justice

-Prioritarianism(Derek Parfit 1995 & 1997)

- An improvement in a person’s well-being that arises from a lower absolute level is *morally more weighty*, and should therefore have *priority* over an equally large improvement in a person’s well-being that arises from a higher absolute level of well-being.(Parfit 1995)
Theories of Distributive Justice

- Prioritarianism
  - rejects *strict equality* as the proper distributive ideal of justice.
  - focusing on ensuring that *the worst off have enough resources* (income or wealth).
Theories of Distributive Justice

- Prioritarianism

  “On the Priority View, benefits to the worst off matters more, but that is only because these people are at a lower absolute level. It is irrelevant that these people are worse off than others. Benefits to them would matter just as much even if there were no others who were better off.” (Parfit 1995, 23)
Theories of Distributive Justice

- Prioritarianism
  - Diminishing Marginal Value+Seperability+Maximization
    - DMV: An increment that takes place from a lower level receives a *higher moral weight* than an increment that takes place from a higher level.
    - Seperability: The moral value of (an increment in) a person’s well-being does not depend on how anyone else fares. *non-relational!*
    - Maximization: We ought to maximize the sum-total of moral value of the well-being of persons.(Otsuka and Voorhoeve 2018, 69).
Theories of Distributive Justice

- Prioritarianism

  - Final-well-being prioritarianism
    - focusing on maximizing the probability-weighted sum of one’s priority-weighted well-being in each probable state of the world. (Adler 2012). (intra-personal vs inter-)
    - It adopts, in case of a single person, a principle that is appropriate only for a society consisting of many separate persons whose interests clash with one another, and so disregards the separateness of persons and the existence of competing claims.
Theories of Distributive Justice

- Prioritarianism

- Expected-Well-being prioritarianism
  - Each person’s expected well-being has positive and diminishing marginal moral value.
  - The moral value of (increment in) a person’s well-being does not depend on anyone else’s moral value.
  - We ought to choose the option with the greatest sum of moral value (the greatest sum of priority-weighted expected well-being).
Theories of Distributive Justice

- Prioritarianism

- Expected-Well-being prioritarianism
  - Avoids the discrepancy between prudential and moral evaluation in a single-person cases that plagues final-well-being prioritarianism.
  - As a consequence, it treats intra- and interpersonal trade-off differently: in interpersonal trade-offs, it requires maximizing expected well-being (prudential justification); in intersessional trade-offs, it gives priority to whoever has lower expected well-being.
Theories of Distributive Justice

- Prioritarianism

- Hybrid Prioritarianism
  - Final-Well-being prioritarianism + Expected-Well-being p.
  - more sensitive to the availability of prudential justification (intrapersonal), the presence of competing claims (intrapersonal), and the unfairness of inequality

=> fully respect the unity of the individual and the separateness of persons.
Theories of Distributive Justice

- Prioritarianism

- Objections
  - Egalitarianism normally do not defend leveling down. (L. Tempkin 2002, 155).
  - It is only one among several important values. (pluralism)
    - *Equality must be weighed against other values* when considering what is just.
  - Is a world where only some are blind is worse than one where all are blind?
Theories of Distributive Justice

- Prioritarianism

- Objections
  - Parfit’s approach reduces everything to a question of *individual welfare*. It disregards the *quality of social relations*.(O. O’Neil 2008, 141-20)
  - Which distribution is better?
    1. Half at 50, the other half at 250 = 300
    2. Everyone at 99. = 298
Theories of Distributive Justice

- Prioritarianism

- Objections
  - *T. Scanlon’s five reasons* to be concerned with equality (Scanlon 2018)
    
    to avoid 1) poverty and sufferings, 2) stigmatization and status differences,
    
    to ensure 3) everyone equal opportunity for political influence, 4) a fair share of what we collectively produce
    
    to provide 5) everyone with a more or less equal starting point in life. 2), 3), 4) egalitarian reasons.
Theories of Distributive Justice

- Prioritarianism

- Objections
  - Prioritarianism is *compatible with enormous inequalities*, and is not interested in providing enough for everyone.
Theories of Distributive Justice

- Sufficientarianism


“what is important from the point of view of morality is not that everyone should have *the same* but that *each should have enough*. If everyone had enough, it would be of no moral consequence whether some had more than others.” (1987, 21)
Theories of Distributive Justice

- Sufficientarianism

- It targets economic egalitarianism.
- Everyone (or as many people as possible) should have enough. (resources, or welfare, or opportunity)
- Further questions that must be addressed:
  - Enough of what?
  - Enough for what?
  - How much is enough?
Theories of Distributive Justice

- Sufficientarianism

- Two examples:
  - inequality between millionaires and billionaires
  - When there are only 40 units of resources available, and there are ten people in the group and each person needs five of remaining resources to survive. (When equal distribution means that everyone dies)
Theories of Distributive Justice

- Sufficientarianism

- Two general conclusions from these example:
  - Distributing resources equally is wrong in conditions of scarcity. It will be better to ensure that as many people as possible have enough.
  - When many of us react negatively to inequality, we are not (in fact) reacting to inequality as such, but to the fact that some do not have enough.
Theories of Distributive Justice

- Frankfurt wants to show that equality is not intrinsically valuable!(1987, 32)
Theories of Distributive Justice

- Sufficientarianism

  - How much is enough?
    - Having sufficient resources, or being above a certain threshold? When people have no reason to be dissatisfied? When their reasons to be dissatisfied do not relate to money (resources)?
    - A contented person regards having more money as inessential to his being satisfied with his life. (Frankfurt 1987, 39)
Theories of Distributive Justice

- Sufficientarianism

- Objections to sufficientarianism
  - Is it possible to define the level of the threshold in a way that is not arbitrary or ambiguous? (Arneson 2005, 26–31)
  - It is difficult to see why justice demands distribution below the threshold, while at the same time demanding no distribution above the threshold!
Theories of Distributive Justice

- Sufficientarianism

- If the goal is to ensure that as many people as possible get enough, one may sacrifice those who are far below the threshold in order to lift those close to it to a level above the threshold. (Shields 2012, 101)

-> SFS is attractive because it is vague when it come to the level of sufficiency!

* enough to escape absolute poverty<--> more ambitious goal?
Theories of Distributive Justice

- Sufficientarianism

- Sufficientarians with the view that equality has no moral appeal, fails to consider the myriad ways in which we should care about equality (which are related to our concern for sufficiency).

- Is the distribution above a certain threshold morally irrelevant? How about the tax policy to put all the tax burdens on the worst off who will still remain above the threshold even after paying taxes?
Theories of Distributive Justice

- Sufficientarianism
  
  - Sufficientarianism might be used to justify tax avoidance by the rich. (motivated by the desire to discredit egalitarian thinking)

  IF then, must we reject SFT?
Theories of Distributive Justice

- Sufficientarianism

  - Liam Shields’ *Shift* thesis (Shields 2012)
    - SFT can be combined with forms of egalitarianism
    - When everyone has been lifted above the threshold, our reason for further distribution *shift*.
    - Redistribution above the threshold is *less important, but not unimportant*. 
Theories of Distributive Justice

- Sufficientarianism

- Two thresholds Thesis (Huseby 2020)
  - There is a level of welfare that everyone should reach (Shields’ positive thesis), and a level of welfare where redistribution is no longer important (negative thesis).
  - It is only once one gets above the upper threshold that redistribution is no longer relevant.
  - *In between the two thresholds*, egalitarian principles can be applied.
Theories of Distributive Justice

- Sufficientarianism
  - R. Crisp’s Prioritarian Sufficientarianism (Crisp 2003)
    - Absolute priority is to be given to benefiting those below the threshold rather than above it.
    - For those below the threshold, priority is given to benefiting people especially when they are much worse off than others.
    - For cases involving only trivial benefits below a threshold or when are above it, they are assigned no priority.

However, do we have no good reasons to care about how burdens are distributed above the threshold? concern for fairness!
Theories of Distributive Justice

- Connections between Equality and Sufficiency

- In order to gain proper insight into the nature of our distributive justice responsibilities towards our compatriots, we need both of two perspectives:
  a comparative vs a non-comparative perspective

- From comparative perspective, we can consider the question of what we owe our compatriots.
Theories of Distributive Justice

- Connections between Equality and Sufficiency

- In working towards an answer, we might say that all compatriots deserve equality of some kind.

- What are good candidates of the relevant equality?
  1) equal consideration of interests
  2) standing in relations of equality with one another
  3) equal positive freedom (as needed to avoid domination)
Theories of Distributive Justice

- Connections between Equality and Sufficiency

- Even if we accept a particular ideal of equality, we need to supplement our analysis with *more substantive views about* which *interests*, dimensions of *human experiences*, or *activities* *matter* and should be a focus, *in order to have a determinate answer* to the question of what equality itself demands.
Theories of Distributive Justice

- Connections between Equality and Sufficiency

- So, we need to ask questions such as:
  - What do human beings need to function adequately? (What are basic human needs?)
  - What does someone need to live well? (What do human beings need to flourish?)
  - What basic human entitlements should all people enjoy? (human rights?)
Theories of Distributive Justice

(* Other theories of Distributive Justice)

- needs-based theories (basic needs theories)
- capabilities-based theories -> human flourishing theories (Aristotelian liberal theories)
- desert-based theories -> meritocracy
- libertarian entitlement theories
  absolute self-ownership -> private property rights
‘Equality of What’ Debate

- Especially among egalitarian liberals

- simple equality (opportunity vs result)
  1. equality of **resources** (R. Dworkin 1981a & 1981b)
     or equal opportunity for resources
  2. equality of **welfare** (R. Arneson 1989 & 2000)
     equal opportunity for welfare
‘Equality of What’ Debate

- Especially among egalitarian liberals

- simple equality

  3. equality of **capabilities**

  or equal opportunity for capabilities (A. Sen 1993 & 2004; M. Nussbaum 1993 & 2021)

- complex equality (M. Walzer 1983): *Spheres of justice*

- relational equality (E. Anderson 1999): “What is the point of equality?”
‘Equality of What’ Debate

- Among egalitarian liberals
  - relational equality vs luck egalitarianism
    - luck egalitarianism
      - the goal of an egalitarian theory to compensate people for undeserved bad luck
      - undeserved bad luck: “being born with poor native endowments, bad parents, disagreeable personalities, suffering from accidents and illness” (Anderson 1999, 288)
‘Equality of What’ Debate

- Among egalitarian liberals

  - luck egalitarianism
    - The goal is “to eliminate the impact of brute luck.”
    - being called responsibility-sensitive egalitarianism
      = It is wrong for some people to be worse off than others as a result of conditions outside of their control (Parfit 1997, 204; Cohen 2011, 13)
‘Equality of What’ Debate

- Among egalitarian liberals

  - luck egalitarianism
    - a mix of capitalism and welfare state (as a kind mandatory insurance scheme, or safety net)
  - can be divided into two camps
    - resource equality vs welfare equality
‘Equality of What’ Debate

- Among egalitarian liberals

- objections to luck egalitarianism (E. Anderson 1999, 295-305)
  - “the harshness objection”: an uninsured driver’s accident
  - “the vulnerability of dependent caretaker’s objection”
    Is there no good reason to compensate someone who quits the workforce to take care of people in need?
  - “the condescension objection”: The talented (the pretty, the smart) compensate the untalented (the ugly....)
‘Equality of What’ Debate

- Among egalitarian liberals

- an example of “the condescension objection”

(The state’s department send out the following message)

“To the ugly: How sad that you are so repulsive to people around you that no one wants to be your friend or lifetime companion. We won’t make it up to you by being your friend or your marriage partner (we have our own freedom of association to exercise) but you can console yourself in your loneliness by consuming these material goods that we, the beautiful and charming ones, will provide. And who knows? Maybe you won’t be such a looser in love once potential dates see how rich you are.” ==> paternalism
‘Equality of What’ Debate

- Among egalitarian liberals

- relational equality
  - what matters intrinsically is the quality of life, namely the the quality of relationship (regarded as instrumental to well-being)
  - resource egalitarians cannot point to any more fundamental ideal that justifies their concern with distribution of goods.
‘Equality of What’ Debate

- Among egalitarian liberals

- two approaches
  - positive approach
    - E. Anderson and S. Scheffler
    - The conception of *citizen as free and equal* forms the basis for the ideal of relational equality (Rawls)
    => Equality is a social and political ideal that governs *relations between people. Everyone is basically alike!*

If then, *what social, political and economic arrangements are compatible with relational equality?*
‘Equality of What’ Debate

- Among egalitarian liberals

  - negative approach
    - It is easier to say what relational egalitarians are against than what they are for.
    - It is against stigmatization, discrimination domination, servility, exploitation, etc.
    - All citizens are free and equal, and therefore one cannot allow inequalities that undermine this ideal of citizenship: democratice equality.
‘Equality of What’ Debate

- Conclusions

- Distributive justice theory (as an area of Anglo-American analytical normative philosophy) is an important theoretical foundation for legislation and policymaking.
- It can help to set the direction of social scientific researches, by clarifying the meaning of social scientific concepts.
- More positively, it can help to clearly identify the normative purposes of social scientific researches.