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Precis of why does inequality matter?

T. M. Scanlon[1]

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My aim in this book is to explain why we should be concerned with inequality, rather than simply with making people better off. People have obvious reasons for wanting to be better off, and particularly strong reasons to object to poverty. But it is less clear what reasons they have to be concerned with the difference between what they have and what others have. I think that there are a number of good reasons for objecting to inequality, and my aim in the book is to make clear what these reasons are.

I do not believe that inequality is always objectionable. It does not seem to me a problem, for example, that women generally live longer than men. If men generally lived longer than women, on the other hand, this would seem more troubling, because we might suspect that it was due to male babies getting better nutrition and men getting better medical care. The resulting inequality would be objectionable because it arose from unjustifiably unequal treatment, a violation of what I call the requirement of Equal Concern. I discuss this form of objectionable inequality in Chapter 2 of my book. One implication of that chapter, and of my book as a whole, is that there is no single answer to the question "equality of what?" Different forms of inequality can be objectionable for different reasons. Objections based on Equal Concern, in particular, arise when an agency's is obligated to provide a certain benefit to a group of people and (without justification) supplies more to some than to others. Since different agencies are obligated to provide different benefits, the goods that can be objectionably unequal in this way will vary.

There are other objections to inequality. Imagine two societies in both of which 99% of the people have the same, quite tolerable, level of income. In one society 1% are much better off; in the other society 1% are much poorer. These societies may have the same Gini coefficient, but are different reasons for objecting to the

✉ T. M. Scanlon
scanlon@fas.harvard.edu

[1] Cambridge, USA

inequality they involve. One thing that strikes us about the society in which there are a few very poor people is what it would be like to be so much poorer than everyone else in one’s society. This objection would not apply to the society with a few very rich people. If the rich people are just a few entertainers or athletes, who have no special political or economic power, then this inequality may not matter very much. But if these people own all the businesses in which others have to work, or if their money gives them inordinate political influence, this is serious problem.

Objections to status inequality of the former kind are the subject of my third chapter. Inequality of status exists in a society when there are widely held attitudes according to which certain people are held to be inferior to others in important ways: less eligible for positions of power or authority, less desirable as friends, neighbors, co-workers or family members. Racism and sexism are familiar instances of inequality of this kind. Simply being poor can also be an inferior status of this kind, if lacking money and things that it can buy is generally regarded as marking a person as inferior, and socially less desirable than others. These forms of status inequality all depend on the prevailing attitudes in the society, and one thing that these attitudes have in common is evaluative error: they give certain features of a person, such as race or gender, forms of significance that they do not in fact have. Common objections to “meritocracy” are of this same form. They are valid objections when success in a competitive society is seen as not merely something that a person might hope for and be disappointed not to achieve but also as a mark of social superiority.

Understood as equality of opportunity, however, meritocracy is can be viewed more favorably, as an important form of equality that can be undermined by large differences in income and wealth. In Chapters 4 and 5 I explain the basis of equality of opportunity by analyzing it as two separate requirements. The first, Procedural Fairness, is the requirement that individuals be selected for positions of advantage on the basis of relevant characteristics. What these are is determined by the justification for having these positions of advantage to begin with. If the justification lies in the benefits that will arise from having these positions when they are held by individuals with the required qualifications, then the institution is operating in a way supported by this justification only if individuals are selected for these positions on the basis of these qualifications. What these qualifications are—what counts as “ability” in the relevant sense—thus depends on the nature and justification of the institution in question.

A second, independent component of equality of opportunity is the requirement of Substantive Opportunity: that all individuals who would develop the relevant abilities given proper education or training should have the opportunity to do this if they so choose, regardless of the economic or social position of their families. These two elements of equal opportunity are distinct and have different moral bases.

It is often said that what equality of opportunity requires is that individuals’ chances of success should depend only on their ability and effort. There is something right about this, but if ability and effort are seen as positive characteristics of individuals that deserve reward this leads to a form of moralism that it is important to avoid. I provide alternative interpretations of ability and effort that avoid moralism of this kind. In Chapter 8 I argue, more generally, that there is no institution-independent notion of desert that can provide justification for, or a limit on, economic inequalities.

Racism, gender discrimination and other forms of status inequality commonly lead to objectionable inequality of the two other kinds I have just discussed: violations of Equal Concern—the unequal provision of public services owed to all—and violations of Procedural Fairness, when members of the groups discriminated against do not receive fair consideration for positions of advantage. But it is important to see that these three kinds of wrongs are distinct. Equal Concern and Procedural Fairness are general moral requirements that can be violated in ways that have nothing to do with race or gender. They can arise, for example, from nepotism or political favoritism, or sheer laziness. Selecting individuals for employment or educational opportunities on the basis of race and gender can be, and often has been, a violation of procedural fairness. But this is not always the case. Whether it is depends on the legitimating purposes of the institutions in question. Given a history of pervasive discrimination, all-black or all-female colleges serve important purposes. Their policies of excluding non-blacks and men from consideration does not constitute procedural unfairness, and does not involve declaring members of these groups to be in any way inferior. A similar case can be made for some forms of affirmative action in education and employment.

Another objection to economic inequality, which I consider in Chapter 6, is that it undermines the fairness of political institutions. Political fairness is sometimes understood in a way parallel with the two parts of equality opportunity: as consisting of a formal component specifying rights to political participation and a substantive requirement that citizens have equal access to the means that are required in order to make use of these rights to affect political outcomes. I argue that this parallel is misleading. Equal access to the means of political influence is important, and sorely lacking in the contemporary U.S. But this is not the only way in which economic inequality can undermine the justice of a political system. If, for example, a majority of people are wealthy enough not to need public provision of some good, such as public education, they may refuse to pay for supplying the amount that others need and are owed. Formal rights and equal access to the means of political influence will not rule out the possibility of political institutions failing to function properly in this familiar way.

The pursuit of greater equality is often claimed to be in conflict with individual liberty, particularly if equality is seen as pursued mainly through redistributive taxation. In Chapter 7 I argue that, although redistributive taxation can be justified, the primary focus of egalitarians should be on the features of institutions the generate unequal wealth and income to begin with. Individuals have good reasons for being concerned with liberty, both reasons to want a wider range of opportunities to choose from and reasons to object to being under the control of others. The justification of institutions needs to take into account the reasons of this kind that individuals in all social positions have—not only reasons for objecting to the enforcement of laws, but also reasons for objecting to lack of liberty in the workplace and elsewhere in life.

One question about the two societies I mentioned earlier is what gives rise to the inequality they involve: what holds down the income of the poor in one case and generates the income of the rich in the other? In Chapter 9 I argue that inequality can be objectionable not only because of its effects, such as on equality of opportunity and political fairness, but also because the mechanisms that generate it cannot be given the necessary justification. Drawing on previous chapters, I argue that institutions that generate inequality cannot be justified on the basis of pre-institutional desert or natural property rights, but must be justified on the basis of the benefits they bring, even to those who have less. I thus arrive at a version of Rawls' Difference Principle, through a somewhat different route from his.