Inequality

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What is wrong with inequality?

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Executive summary

- **We have reasons to reduce inequalities.** Some argue that inequality is of no significance provided that everyone has 'enough' (the 'sufficiency' view). But there are numerous reasons why we should seek to reduce inequalities that go beyond the importance of achieving sufficiency.

- **Reasons to reduce inequalities include that measures to do so can enhance social welfare and that they can make society fairer.** Inequalities can be unfair because of what causes them (e.g. discrimination or other failures of equality of opportunity) and/or because of their consequences (e.g. they cause objectionable inequalities in status or power). We have reason to remove unfair causes of inequalities and to prevent unfair consequences.

- **When acting to reduce inequalities an important guiding principle is that of social or relational equality.** This includes equality of social status and an absence of domination.

- **To realise relational equality, egalitarian strategy should not only focus on income transfers, but consider a wider range of approaches including measures to spread the distribution of assets/wealth and to build associational power.**

- **In acting to reduce inequalities at the national level it is necessary to respect global justice and environmental responsibilities.**

1. Introduction

We live at a time of very high inequality within many countries: these inequalities are found across the dimensions of income, wealth and the ownership of productive assets, educational opportunity, life expectancy, health and political influence. Across the developed world, many such inequalities have been growing since the 1970s, although at different rates in different countries (Piketty, 2014; Atkinson, 2015). At the same time, globally, our world has seen a tremendous decline in poverty: over the past 25 years, a billion people have been lifted out of extreme poverty. Today about 10% of the world lives in extreme poverty, defined as less than $1.90 per day; in 1990 that number was 37%. This has meant that inequality between countries has also somewhat declined at the same time that inequality within many individual countries has been increasing (Ravallion, 2018).

This rising inequality, particularly with respect to in-country economic inequality, is a growing concern of a number of contemporary social movements.[1] The COVID-19 pandemic has underscored this concern. In the UK, it has disproportionately affected black people, those from other minority ethnic groups and those with disabilities (House of Commons Women and Equalities Committee, 2020; Oung and Elias, 2020). Underlying economic inequalities have

[1] One example is the Occupy movement of 2011–12. See Kaldor and Selchow (2013).

strongly shaped individuals' opportunities to work from home and to isolate when ill or at risk of spreading the virus.

However, some people argue that we should focus only on eliminating global and domestic poverty and not worry about inequality. Some also argue that greater equality *always* comes at a high cost: economist Arthur Okun claims that there is a trade-off between equality and efficiency (Okun, 1975); the philosopher Robert Nozick spoke for many critics when he charged that achieving distributional equality requires constant interference with people's liberty (Nozick, 1974). Others have argued that equality is at odds with the value of 'meritocracy' since people have different and unequal talents (Mankiw, 2013). Finally, some critics go even further and contend that a concern with equality reflects a moral failing: it is rooted in envy or resentment of the better-off (Nietzsche, 1989 [1887]).

We will argue that all of these objections are mistaken or can be addressed. Inequality matters. At the same time, *not all* inequalities between people are objectionable or important. Some people are taller than others; some are better at hand–eye coordination, while others are better cooks; some excel at music while others are tone deaf; college professors are usually less fit than professional athletes. But these inequalities do not typically elicit moral concern. Any view about what is wrong with inequality has to deal with the pervasive fact of human difference and to distinguish those inequalities that matter from those that give no cause for concern.

This chapter lays out the reasons we have for objecting to certain differences between what individuals have and in how they relate to one another. Our aim is to show that there is a plurality of reasons to be concerned with such *differences* and not simply with the absolute amount that each individual has considered independently (Scanlon, 2018). Further, we argue against a limited focus on income inequality. Other forms of inequality can also matter.

Section 2 introduces some of the key concepts in the philosophical discussion of equality. Sections 3–5 then set out arguments for why inequality is objectionable and we should act to reduce it. Section 3 focuses on arguments that reducing inequalities can increase or maximise social welfare. Sections 4 and 5 focus on arguments that inequalities are *unfair*. Section 4 focuses on arguments that inequality can be unfair by virtue of what causes it, while Section 5 focuses on arguments that it can be unfair by virtue of its consequences. In Section 6, we then consider, and largely reject, some notable arguments against seeking to reduce inequality. Section 7 concludes.

2. The landscape of equality: key concepts

Sufficiency

As already suggested, concern about inequality is distinct from a concern to ensure that everyone has enough to satisfy their basic needs – 'sufficiency'. Philosopher Harry Frankfurt argues that what matters is 'not that everyone should have *the same* but that each should have *enough*'. When everyone has enough, he claims, it is of no moral consequence if some have more than others (Frankfurt, 1987).

Sufficiency matters enormously. To see why, note that equality itself is not defined with respect to level. A society in which everyone was starving might be an equal society but it would not provide its members with sufficiency; nor would it be desirable. However, a society which meets sufficiency might still contain very substantial inequalities in incomes, wealth, status and power. For reasons we will elaborate below, these can still be unfair and/or otherwise undesirable even if they do not have the specific consequence of denying someone access to a decent threshold (see also Casal (2007)).

Additionally, even if one is only concerned with achieving sufficiency, what is 'sufficient' in one area might be shaped by inequality in other areas and so demand action against inequality in these areas. Consider the example of achieving sufficient 'capabilities'. Amartya Sen argues that we should be concerned fundamentally with 'capabilities': the power that individuals have to achieve various valuable 'functionings' such as happiness, good health and full participation in society (Sen, 1992). If we think of sufficiency in terms of a set of basic capabilities, then it can depend not only on the income or wealth people have in absolute terms but on how much they have relative to others. One basic capability is the power to participate fully in society, without being exposed to shame or risks to one's self-esteem. This capability, in turn, might well depend on how much income one has comparatively. If one has low income relative to others, then one might not be able to afford some of the goods necessary for such participation. (Adam Smith believed that in his day, the ability to appear 'in public without shame' involved having a linen shirt (Smith, 1981 [1776]).) Greater equality in the space of income achieves – is needed to achieve – sufficiency in the space of capabilities.[2]

Thus, while the concept of sufficiency is analytically separate from the concept of equality, there are many circumstances where determining the level of sufficiency requires making comparisons between people (Satz, 2007). In such cases, achieving sufficiency has an egalitarian dimension. What sets sufficiency apart from equality is (as mentioned above) that equality as a concept is indifferent as to level, whereas sufficiency is defined with respect to some threshold.

Priority for the worst-off

Intuitively, it makes sense to think that giving an additional dollar to a millionaire has less of an effect on her well-being than giving that dollar to someone who is destitute (Mirrlees, 1971). Based on this intuition, one can argue that there is strong reason to give *priority to the worst-off* in arranging rules for distributions of benefits (Parfit, 2000).

This 'priority principle' is distinct from both sufficiency and equality. It differs from sufficiency because priority will weigh the claims of the least well-off more strongly than those of the better-off even when everyone is at or above sufficiency (whereas sufficiency is indifferent with respect to this matter). Sufficiency itself is also unconcerned with how far above or below the sufficiency level a person is. It differs from a concern for equality because it is committed to improving the worst-off but not to worsening the position of the better-off in cases where the worst-off position cannot be improved.

To appreciate this latter distinction, consider the *levelling down objection* to equality. Imagine a situation where there is an inequality between people but where any attempt to reduce the inequality only makes some people worse off while making nobody any better off – a case of 'levelling down'. If you care about equality for its own sake, then it seems like you must accept that the more equal world is (in at least one respect) better than the unequal one. But, in this case, it may seem implausible to prefer the more equal world because, as noted, by stipulation, nobody's life is actually improved by equality while some people's lives are made worse. Proponents of the priority principle need not endorse moving to the more equal world in such a levelling-down case.

[2] It also may be that the best way to achieve sufficiency is to direct resources from the top of the income and wealth distribution to those at the bottom of the income distribution.

Their concern is the quality of life of the worst-off and, if this is not enhanced in the more equal world, there is no rationale for preferring it.

In response, some egalitarians have argued that while it is usually undesirable to level down, all things considered, this does not mean that the more equal world is not better in one respect – that it is more equal – and so does not necessarily imply that equality as such is not a value (Temkin, 2000). However, many find it implausible that there is always even a trivial value to equality in such cases – for example, in the equality of nobody being able to access a scarce medical treatment as against a lucky few (chosen at random) getting that treatment.

Nor do we need to argue this way to support a prioritarian case for greater equality. If we ask which set of economic rules (including tax policies) will work to the advantage of the worst-off in the long run, then the answer will likely look different from the ones that characterise many capitalist societies. In that case, reducing inequality would not constitute a levelling down.[3] Indeed, practically, one may wonder whether there are many genuine cases of levelling down, especially with respect to income and wealth. Consider that levelling down income and wealth may yield improvements for those less well off in terms of a range of outcomes such as fairer legal justice or more substantive equality of opportunity.

Equality of opportunity

Commentators on both the left and the right often compare equality of outcome unfavourably with equality of opportunity, with the latter being seen as the basis for a fair society which rewards effort and talent – a 'meritocracy'. By contrast, advocating greater outcome equality, according to critics, unfairly treats people who make unequal effort and have unequal talent alike.

The concept of 'equality of opportunity' has, however, many different interpretations.

According to the most minimal view, *formal equality of opportunity*, equal opportunity obtains just so long as no person is subject to legal blocks in competing for jobs and offices. A somewhat stronger view is that equality of opportunity also requires the state to prohibit employers and other institutions from discrimination (from, roughly, offering jobs and positions on a basis unrelated to the individual's aptitude). Let us call a society with this second kind of equal opportunity a *weak meritocracy* (the reason for 'weak' being clarified immediately below).

Even in a context of robust non-discrimination, some will be at a significant disadvantage in competing for jobs and offices due to inequalities in social background that affect their personal development and economic opportunities. Sources of unequal opportunity, for example, might include unequal access to education due to differences in parental wealth, parental education levels, health and nutrition. Merely providing formal equal opportunity or weak meritocracy does not work for reasons pointed out by US President Lyndon Johnson in his 1965 speech supporting 'affirmative action' for African Americans: 'It is not enough just to open the gates of opportunity. All our citizens must have the ability to walk through those gates'.

[3] While the priority principle has many defenders, its general applicability is open to question. On the one hand, the case for giving an extra dollar to the destitute over giving it to the millionaire seems strong. On the other hand, is it really evident that we should give priority to giving the marginal dollar to the millionaire over giving it to the billionaire (Crisp, 2003)? Note, however, that that Pigou–Dalton principle, which is widely used by economists to justify income transfers that decrease inequality, is violated when we do not prioritise transfers to the millionaire over those to the billionaire. Thus, while 'prioritarianism' is compatible with the Pigou–Dalton principle, the sufficiency principle is not.

This concern animates what we term, following John Rawls, *fair equality of opportunity*. Fair equality of opportunity aspires to a society in which there are 'equal life prospects for all sectors of society for those similarly endowed and motivated' (Rawls, 1999 [1971], 265). It therefore seeks to redress disadvantages due to factors such as unequal educational opportunities and unequal initial wealth endowments but allows for disadvantages due to unequal effort and talent. Taken by itself, fair equality of opportunity is compatible with a *'strong' meritocracy*. Rawls's own view, however, is that we cannot take this principle by itself. For one thing, it is not clear that it is desirable to allocate all of society's goods and opportunities as rewards for effort and talent. Should we distribute political rights, life-saving medicines, or healthcare to people on the basis of their talents?[4]

Fully achieving equality of opportunity in Rawls's sense is extremely difficult, given the effects that families have on the development of their children's motivations and endowments.[5] However, even to the extent that we can achieve it, some argue that even in this strong form meritocracy does not satisfy the underlying demand for equal opportunity. In such a society, some will still have more limited market opportunities than others because of the unequal distribution of 'natural abilities' that are not under their personal control.

These latter theorists have developed accounts of what we might call *uncompromising equality of opportunity*: roughly, the idea that people ought not to suffer disadvantage in access to the good things of life by virtue of any factor beyond their personal choice and control.[6]

In its uncompromising form, equality of opportunity corresponds to a philosophical view known as 'luck egalitarianism'. Something is a matter of 'brute luck' if it is not reasonably within the agent's control. The luck egalitarian holds, roughly, that relative disadvantage due to bad brute luck is unfair, while that which is due to choice is fair (Cohen, 1989; Lippert-Rasmussen, 2015; see also Dworkin (2000)). On this view, inequality in income or wealth is unfair if it is due to factors that the individuals cannot control, such as their 'natural abilities' or the families into which they are born, but fair in so far as it reflects different choices made against a background of equal options.

How compelling is uncompromising equality of opportunity? It is certainly true that people are more likely to respond negatively to the wealth held by those born with silver spoons than to that of those who made their way up the economic ladder by hard work. Nevertheless, the 'luck egalitarian' view has serious problems.

Most fundamentally, there is reason to question whether luck egalitarianism captures, or captures fully, what egalitarians ought in principle to be concerned about (Anderson, 1999). On the one hand, luck egalitarians often call for 'compensation' for those with 'handicaps' and low earnings potential. But the very notion of 'compensation' in this context can seem patronising and demeaning. On the other hand, luck egalitarianism is implausibly harsh in apparently suggesting

[4] Rawls (1999 [1971]) denies that his theory endorses a meritocratic society, in part because it includes the difference principle which maximises the level of the least well-off person irrespective of their level of talent.

[5] As Rawls notes, taken to its conclusion, this ambition might suggest the need to abolish the family as a fundamental source of unequal opportunity. However, Rawls's notion of fair equality of opportunity assumes that we will not take this step but nevertheless take serious action to limit background sources of unequal opportunity – for example, through the design of the education system, appropriate inheritance taxes, and the like. See Rawls (1999 [1971], 64, 263–7, 447–8).

[6] We abstract from some nuances here, but we have in mind here Ronald Dworkin's theory of 'equality of resources' and G. A. Cohen's principle of 'equality of access to advantage'. See Dworkin (2000) and Cohen (1989).

that people should simply suffer any disadvantage due to their choices. Should the ambulance pass by the drunk driver who has had an accident if it is the driver's own fault? In any humane society, the answer is no. In addition, showing that one is entitled to community support because one's unemployment is bad brute luck may place on the unemployed a burden of 'shameful revelation' in that they have to show the state that they have continually tried to find work but have been continually rejected (Wolff, 1998). Indeed, some forms of transfer that reduce economic inequality might be objectionable because even if cost-effective, they are not considered dignified in particular settings. In such cases, a cash transfer paid to a redundant steelworker will not adequately substitute for the dignity of a wage earned by hard work.

Consider also that an equality of opportunity principle cannot, by itself, serve to justify our practices or institutions. A dictatorship can satisfy this principle just in case all individuals have an equal opportunity (however understood) to be a dictator. The ideal of equality of opportunity must itself attach to institutions and practices that are justified on independent grounds (Scanlon, 2018). Whether the prize structure of most current societies – the stakes attached to occupying different social positions – is justified is not something that can be answered by appeal to equality of opportunity.

There are reasons, including those we discuss below, to care about unequal outcomes even if they emerge from conditions that satisfy the principle of equality of opportunity. For one thing, *equality of outcome directly affects equality of opportunity when we think about the next generation*. Some inequalities of outcome for parents may simply constitute inequalities of opportunity for their children. This is especially the case where parents are willing to spend significant resources on their own children's education. If we care about children's unequal opportunity, then we have reason to care about inequality of outcome for their parents.

A bigger picture: relational equality

The discussions above motivate a view of equality that is fundamentally *relational*. Relational egalitarians argue that we should understand the ideal of 'equality' as fundamentally about the nature and quality of *social relations* between people rather than about the *just distribution of goods*. A society enjoys 'equality' when its social relations are free of unaccountable power, stigma or grovelling. Such a society stands in opposition to forms of social organisation based on caste or class hierarchies. Relational equality is closely related to one interpretation of the ideal of democratic citizenship: democratic citizens may be unequal in terms of wealth and income, just as long as such inequalities do not threaten their ability to relate to one another as social equals.

Contemporary proponents such as Elizabeth Anderson argue that relational egalitarianism fully captures the ideal of equality that progressive social movements have fought for throughout history, and that, by contrast, 'luck egalitarianism' captures nothing of intrinsic concern (Anderson, 1999).[7] Arguably, relational equality lies behind some of the policies enacted by social democratic governments in the mid 20th century. Social insurance, unemployment benefits and national healthcare are all measures that create a social safety net which prevents one person from becoming very dependent on another. We might also seek to prevent an accumulation of excessive political power by setting an upper limit on how much wealth any individual can hold – one consideration behind the 'limitarianism' perspective recently developed by Ingrid Robeyns (Robeyns, 2017, 6–10). Plato had earlier argued that no one should be more than four times richer

[7] For a related argument, see also Iris Marion Young's critique of the 'distributive paradigm' and development of an alternative perspective based on the 'five faces of oppression' (exploitation, marginalisation, powerlessness, cultural imperialism and violence) in Young (1990). Nancy Fraser's conception of justice as 'participatory parity' also has a relational focus (Fraser, 2003).

than the poorest member of society (Plato, 1960, 127). As these examples show, the relational perspective has important and potentially even radical implications for the rules and institutions that control how income and goods are distributed – even though it does not see distributions of income and goods as what equality is fundamentally about.

Below, we will canvass some specific reasons to be concerned about economic inequality, several of which have to do with relations between the members of a society. When we focus on measures of economic inequality, such as the Gini coefficient, we should stop to consider how the significance of a given number will often depend on its relational implications. For example, it may depend on the extent to which a society can cordon off the influence of money from the opportunity for political influence or procedural fairness.

Could the relational view of equality be combined with other views of the importance of equality? Relational egalitarianism might be compatible with the sufficiency principle, and perhaps some form of prioritarianism. It is clearly compatible with non-discrimination and some forms of equality of opportunity. Some argue that we can combine relational and luck egalitarian views (White, 2006; see also Elford (2017)). In attempting to combine these views, however, we need to be alert to the possibility of tensions between them.

Our exploration below of the causes and consequences that make certain inequalities unfair owes much to the relational egalitarian view. In particular we will call out values such as reciprocity, respect and equal standing, and the way that inequalities endanger or violate these values. This way of understanding the harms of inequality clearly has implications both for policy interventions and for where we think research efforts should be directed. While most economists are not 'luck egalitarians' or 'relational egalitarians', they have not usually attended to the different aspects of inequality that lie behind measures such as Gini coefficients. That is unfortunate since, in our view, it can lead to an overlooking of other dimensions of inequality that matter. We discuss the relationships between monetary and non-monetary dimensions of inequality below and throughout Section 3.

Dimensions of equality: measurement

Although our account of why inequality is objectionable will highlight certain non-monetary aspects of inequality such as opportunity for political influence and procedural fairness, these are themselves often caused by, and in turn cause, economic inequality. But how should we conceive of, and measure, economic inequality?

'Economic inequality' itself is usually understood in terms of inequality in income or in 'income and wealth'. While 'income' refers to the flow of pecuniary benefit derived from work or ownership of an asset, 'wealth' refers to a stock of value. Concern with inequality in incomes has an established lineage in economics, with recent writings going back to an idea originated by Hugh Dalton (Dalton 1920) and further developed by Anthony Atkinson (Atkinson, 1970). According to this idea, income inequality is to be understood in terms of a loss of social welfare. One version of this is the Utilitarian argument that income inequality can diminish social welfare because of the marginal decreasing utility of income. James Mirrlees applied this idea to study the problem of optimising the schedule of tax rates (Mirrlees, 1971). While such declines in social welfare can be measured in multiple dimensions, economists have tended to focus on income.

This defence of redistribution raises many questions and objections. If we reject the classical Utilitarian's assumption of the marginal decreasing value of income, then Utilitarianism has no predetermined distributive implications. It simply endorses whatever distribution maximises utility. A different way to defend greater equality of income would be to look at its consequences for a variety of social and political values. (We do this in Section 5 below.)

We can also ask whether the best metric for measuring economic inequality is income. Perhaps consumption is a better measure of what matters since it relates more directly to economic conceptions of well-being (see the third subsection of Section 3). Some family members may possess no income but they consume. At the same time, income tells us something about purchasing power – surely related in a loose way to consumption – and further may have the advantage of being able to allow us to translate our metric more easily into other forms of power and well-being. Credit and savings aside, someone who is consuming without income is presumably consuming at the discretion of someone else who has income, and that points to a relationship of unequal power of precisely the kind that relational equality tells us to be attentive to. Focusing on consumption to the exclusion of income risks missing this kind of inequality.

What about using wealth as our economic metric? Both theory and evidence suggest that wealth is far more unequally distributed than income (Piketty, 2014). If wealth is excluded, this may lead us to underestimate the actual degree of economic inequality in a society. Data on wealth are harder to come by than data on income, and survey data have recognised problems with response rates and reporting from the super-rich. A focus on wealth inequality might seem also to entail a somewhat narrow focus on the top 1%, given that in many societies the vast majority of people possess no or little wealth. But the distribution of wealth is important for reasons that go beyond this narrow top group.

First, from the standpoint of the more substantive views of equality of opportunity, surveyed above, inequalities in wealth matter because they affect the opportunities and choice sets people have. Some people may have greater access to educational or business opportunities than others because they have inherited more wealth. For example, those without wealth are less able to access credit to open up educational or business opportunities (Bowles and Gintis, 1998; Hoff, 1998).

Second, from the standpoint of relational equality, inequalities in wealth also stand out as important, independent of income. Imagine two people with the same income but in one case derived from employment and in the other from capital. The second person is not currently in a job but could get one if they wanted. The first person is dependent for their income on employment while the latter is not. This likely gives the second person more power to hold out for a job they like, and more power, crucially, to walk away from a job if they do not like the way they are being treated. This exit power makes the second person less vulnerable to abuse in the workplace (Hirschman, 1970). This power might also underpin a heightened sense of self-respect and/or the status they are accorded by others in society. We thus see how issues surrounding wealth are not only about the 1%; they also apply to those without wealth and point to the need for a country's institutions to ensure some level of wealth (not only income) for its citizens.

The relational significance of wealth inequality, and the related need to treat wealth distribution as a topic in its own right, is emphasised in the report of the influential Meade Committee on the Structure and Reform of Direct Taxation (Institute for Fiscal Studies, 1978). Set up by the Institute for Fiscal Studies in its opening years, the Committee argued strongly for the direct taxation of wealth and transfers of wealth. In explaining its case, the Committee argued that treating wealth or wealth transfers as significant only as ways of generating capital incomes, or spending out of such incomes, is a mistake: 'The holding of wealth itself, whether it arises from inheritance or from the owner's own effort and savings, can confer on the owner benefits of security, independence, influence and power, quite apart from any expenditure which the income from it may finance' (Institute for Fiscal Studies, 1978, 351).

In thinking about measurement, it is also important to think about whether we are interested only in measuring inequality at one moment of time, or whether we are interested in measuring inequality over time – for example, as it plays out during a person's lifetime. This issue is especially relevant for policymakers thinking about inequities between the young and the old. In many cases, we will have reasons to care about both the synchronic and diachronic aspects of inequality.[8]

Further dimensions of economic equality: scope

Another issue concerns what we call the *scope* of equality: what is the community of persons to which the demand for equality applies? Much of the literature on equality and social justice we have referenced takes the community to be the current population of something like a contemporary nation state. The policy issue is then about how far the government of this nation state should act to limit inequality amongst those who are currently members of this state.

In this chapter, we assume that we are addressing policymakers who are also concerned with this specific, delimited question. However, it is important to see how this *is* a limited question and to reflect on at least two ways in which the claims of equality as a value arguably overrun the bounds of this delimited question.

First, there is a question of equality *in the global context*, beyond the nation state. Political philosophers and much of the public accept that there are at least some claims of justice that transcend the nation state. At a minimum, there are human rights claims that have global application, and these include rights against torture and a right to some kind of due process; and arguably rights against severe deprivation (Shue, 1980). Note that this human rights minimum establishes an important set of obligations on the governments and citizens of nation states, including obligations towards refugees and asylum-seekers whose human rights are threatened in their country of origin (see Owen (2020) for a wider discussion).

Do the claims of justice in the global context go further than this human rights minimum, important as this is? Some philosophers argue that the claims of justice, including one or more of the claims of equality we have sketched above, apply globally in a direct way (Caney, 2005; Carens, 2013). Others have argued that the scope of egalitarian justice is in principle more limited than this. They argue that egalitarian justice applies only between those who are bound by a common framework of coercive law (Blake, 2001; Nagel, 2005). Or they argue that egalitarian justice applies only between those who share participation in a shared scheme of economic cooperation (Rawls, 1999 [1971]). Those who are mutually bound by shared laws, or who share participation in a scheme of economic cooperation, supposedly owe one another a special kind of justification for these laws or rules of cooperation, one that uniquely triggers egalitarian considerations like those sketched above. However, even on these latter views, it can be argued that the scope of equality goes beyond the nation state. In the contemporary global economy, citizens of all nations are plausibly part of the same scheme of economic cooperation. They are also subject to a degree of common coercion in the rules they must follow in pursuing economic and other goals. Thus, as an empirical matter, the conditions highlighted by these views as

[8] For a treatment of justice between age groups, using a relational egalitarian approach, see Bidadanure (2021).

relevant for egalitarian justice do apply across as well as within nations (Beitz, 1999 [1979]; Cohen and Sabel, 2006; see also Ypi (2012), Ip (2016) and Laborde and Ronzoni (2016)).

Pursuit of justice within a nation state must be consistent with our global justice obligations. Even if a policy – for example, trade protectionism – reduces inequality within a state, it can violate a global justice obligation. This point will be especially important in considering trade and immigration policies. Policymakers inevitably confront such questions as to whether and if so how global and in-country inequality are related, and whether within-nation inequality should be the dominant moral concern.

Second, there is the question of equality *between generations*. There is an obvious injustice if one generation uses up most of the world's available non-renewable resources and leaves future generations impoverished. The current generation clearly has some obligations towards future generations.[9] Some philosophers have argued that morality requires that we treat future generations as being as important (or nearly so[10]) as our own generation (Broome, 1994), a perspective which was taken up in the Stern Review on the Economics of Climate Change (2006). There is ongoing debate amongst philosophers as to the exact grounds and content of these obligations. But they also shape the context in which policies to address inequality within current generations are pursued. Policies that reduce this inequality but violate our obligations to future generations should be avoided.

This point is especially important in considering the interaction between the economy and the environment. Ongoing climate change, which has serious consequences both for our current generation and for the generations to come, makes it urgent to address this (Caney, 2020). While there will be cases (hopefully many) in which we can meet our obligations to future generations without sacrificing anything of value for the present generation, this will certainly not always be the case. Thinking about future generations inevitably raises questions about possible trade-offs which makes it harder to avoid filling out the content of our obligations to current and future people. Policies involving long-term projects or projects with long-term effects generally apply a discount rate made up of two factors: a pure discount rate for the factor of time (which philosophers have argued should be near zero) and a factor that reflects the expectation that future generations will be better off. That latter expectation may not be warranted in all cases. Regardless of whether we do actually have a theory of our obligations across time, many of our policies will in fact assume answers to such matters.

3. Objections to inequality: efficiency, social stability, well-being

We have now laid out some of the key dimensions and concepts relevant to a consideration of the call to reduce and limit inequality. We have also started to point to some of the arguments for

[9] Some argue against this claim on the basis of the so-called Non-Identity Problem (Parfit, 1984, 359). We are inclined to say that if we adopt environmentally damaging policies now, this harms people who live in the future. But critics say that the actual people in the future would not exist at all if the current generation had adopted different policies. So long as their existence in the future is at least minimally decent, we therefore cannot be said to harm *them* by adopting environmentally damaging policies now. However, even if we accept the argument, it still implies an obligation to ensure that future generations have at least a minimally decent existence, which is by no means trivial. More generally, the argument can be challenged by suggesting that we can do wrong in an impersonal sense as well as by doing wrong to specific people; or by suggesting that we can wrong the people who make up future generations even if we do not harm them (in the sense of making the specific future people who exist worse off than they would otherwise be). For further discussion, see Kumar (2009) and Finneron-Burns (2016).

[10] Taking into account the small possibility that the future generation may not exist.

caring about inequality that go beyond a concern to ensure sufficiency or to prioritise the worst-off. In this and the following two sections, we develop this case further. As indicated in the introduction, in this section we look at reasons for focusing on inequality reduction related to increasing or maximising overall social welfare. Sections 4 and 5 then focus on arguments about the *unfairness* of inequality. Section 4 draws out a set of arguments that inequality is unfair by virtue of what *causes* it. Section 5 draws out arguments that inequality is unfair because of its distributional or relational *consequences*.

Efficiency

Utilitarianism holds that actions and institutions should be judged according to whether they maximise the aggregate or average level of welfare in society. To the extent that she accepts that there is declining marginal utility of income, then, holding other things equal, a Utilitarian will advocate for greater equality of income. Above, we pointed out that without the assumption of declining marginal utility Utilitarianism, unlike prioritarianism, is actually indifferent to distribution. For a Utilitarian, what matters is maximising well-being, and a concern with distribution is subordinated to that end.

Utilitarians, historically, also implicitly held that utilities could be compared across people and that, additionally, everyone's utility curve was more or less the same. Some economists deny that we can make such interpersonal welfare comparisons. Perhaps, they argue, some people simply need more resources to make them happy than others.[11] However, these critics can make use of the Kaldor–Hicks criterion of efficiency. This says that one state of the world is preferable to another if at least one person is better off in it and nobody is worse off, on the assumption that any 'losers' in moving from the first state of the world can be compensated by the 'winners'. Arguments for reducing inequality in economics tend to appeal either to Utilitarianism or to the claim that doing so is efficient.

Some economists have claimed that we face a trade-off between greater equality and efficiency (Okun, 1975). Arthur Okun argues that if incomes and wealth are progressively taxed then talented elites will change their behaviour in ways that can reduce economic output. For decades the prevailing view was that inequality is the necessary price of policies that stimulate capital accumulation and thereby economic growth.

We accept that there are likely to be points of tension between some policies that aim to reduce inequality and efficiency objectives. At some point, higher marginal tax rates on incomes will discourage production and growth. However, it is important to recognise that this is only one side of the story. There can be important complementarities between some measures that reduce inequalities and efficiency objectives. For example, where capital markets are imperfect, inequality in wealth can lead to underinvestment in human and physical capital. Higher wealth on the part of the asset-poor can unleash otherwise blocked investments (Hoff, 1998; Bardhan, Bowles and Gintis, 2000). A further argument is that production is facilitated by trust between individuals and that trust is improved by economic equality (Bowles and Gintis, 1998). Economists

[11] It might be argued that there is reason to hold onto the simplifying assumptions of the Utilitarians and others about marginal declining utility and interpersonal comparability. State policymakers have little access to the actual utility functions of individuals; gathering that information is a very difficult task, made even more complicated once we recognise that such curves can be distorted by lack of information and a person's becoming accustomed to having little. Gathering such information would also be costly, and very likely invasive to individual privacy interests. For this reason, it makes sense for governments to begin from a default assumption that people are 'alike' with respect to the basic goods and services that governments provide and countenance departures from that assumption only when given good and evident justifications. (For example, a person with a serious physical disability will have more trouble translating income into well-being than a person without such a disability.)

have also considered how the distribution of income can affect aggregate demand and output, arguing that high inequality can sometimes dampen demand and output, suggesting, other things being equal, a potential boost to production from achieving a more equal distribution of income (Carvalho and Rezai, 2016).

Rather than assuming that measures to reduce inequalities always entail a cost in terms of efficiency, therefore, we should adopt a much more nuanced perspective in which we consider on a case-by-case basis the possible benefits, as well as possible costs, to efficiency objectives of such measures.

Social stability

A second argument, connected to economic growth, focuses on the relationship between economic inequality and social stability. The intuition is that a more unequal society will also be a more divided and conflictual society and, in this sense, less ‘stable’. If lower inequality in some dimensions can help a society avoid violent conflict, in societies that are otherwise morally acceptable, this is surely desirable. In addition to the benefit of avoiding conflict for its own sake, other benefits might flow from this. One, already mooted, is greater trust, which can also have positive economic effects. Another is that society will have to expend fewer resources on policing conflict and this will free up these resources for alternative productive uses (Bowles and Gintis, 1998; Graeber, 2018).

Beyond its implications for productivity, it is possible that too much economic inequality in a society would lead to the ‘haves’ undermining or gaming the system in their own favour. Many argue that such gaming is widespread today in many capitalist countries. Too much inequality – if it persists – might also lead the ‘have-nots’ to feel inferior and hopeless about their fate, or to withdraw from participation in collective decision-making. If that is the case, then economic inequality can have implications for the stability of democratic institutions, an issue we will come back to in the second subsection of Section 5.

Well-being

One of the main things that ultimately matter, it might be said, is not how much output a society produces, or how stable its institutions are, but how its members fare in life.

Human well-being is surely important. But there are thorny questions about how to interpret it; how to measure it; and how to compare well-being across different individuals. One popular interpretation has it that well-being is best understood in terms of satisfying subjective preferences (Diener, 2009). But many preferences are adaptations to information and environmental limitations. People who have become accustomed to having very little may feel content with their lot. However, this does not seem like a good reason for them not to have more. On the other hand, if we are tempted by more objective criteria of well-being, what justifies these criteria once the tie to what people actually prefer is broken? Some have tried to repair this tie by arguing that well-being should be understood in terms of what a person would have wanted if they had full information and access to an acceptable range of alternatives (Geuss, 1981). Such views ‘launder’ preferences and argue that only the agent’s suitably laundered preferences should count. Others have argued that these problems should lead us to reject welfare as capturing what ultimately matters. Rawls has argued that we should measure inequality in all-purpose goods that citizens need such as freedoms, opportunities, powers and self-respect, while, as we noted above, Sen has pressed the case that what ultimately matters is the level of ‘functionings’ a person is able to achieve – their ‘capabilities’ (Sen, 1980, 1992).

Decades of psychological research have revealed a number of important aspects about our subjective well-being relevant to issues about equality. The first aspect is that a person's sense of well-being can have a relative dimension. Recall Adam Smith's invocation of the importance of being able to appear in public without shame. In a society in which no one has a linen shirt, a man lacking such a shirt can appear in public on an equal footing with others; that is not so in a second society where most men do have such a shirt and it has become the norm for their public attire. So even if there is no simple resource difference between those without linen shirts in the two societies, it is easy to see why in the second society the well-being of a man without a linen shirt would be lower. Societies that are more unequal in income and wealth may also be more unequal in terms of the social status of their members. This may be especially true when those at the bottom lose forms of employment associated with their self-respect – for example, manufacturing jobs that brought with them some opportunity for advancement and a better life. This 'status inequality' can give rise to a range of psychological effects: higher levels of anxiety and depression, an increase in feelings of pain (Case and Deaton, 2020); unproductive and stressful status competition (Frank, 2011); and, to return to the theme of the last subsection, the additional stresses of living in a society characterised by high rates of instability and lower levels of trust.

In thinking about relative standing and inequality, it is important to view this across time and not simply at a moment in time. When we look at today's inequality in places like the US, it is not only the growing numerical gap that we should look at but also the fact that in recent decades most of the fruits of economic growth have been distributed upwards, while the lives of those at the bottom have stagnated or declined. That decline comes along with changes that bear on a second aspect of well-being.

Psychological well-being is, as Émile Durkheim pointed out, affected by social connectedness (Durkheim, 2002 [1951]). In the United States, the last 50 years have witnessed not only increasing inequality, but a decline in social connectedness (Putnam and Garrett, 2020). Civic engagement, trade unions, marriage, religion and social trust have seen a downward trend. For white workers without a college degree in the US, the coming apart of their social and economic lives has brought about a crisis in pain and suicides (Case and Deaton, 2020). In the UK, the first Minister of Loneliness was appointed in 2018, following survey feedback of decreasing social connectedness, especially among the aged.

Higher national income inequality has also been linked in some studies to a higher prevalence of mental illness (Pickett, James and Wilkinson, 2006) and lower scores on other well-being measures (Alesina, Di Tella and MacCulloch, 2004). Other studies have highlighted a relationship between well-being and the feeling that one has some control and authority over one's life (Bandura, 1977). While the causal mechanisms are not well understood, the most economically unequal OECD countries tend to be associated with higher levels of psychological disorder. They are also associated with a harsh individualistic ethos, and with a decline in the institutions which connect people to one another.

4. Objections to inequality: unfairness in the causes of inequality

The above arguments focus on inequality's complex connections to social welfare. A number of these arguments are empirically controversial. So let us imagine that, in fact, the arguments are flawed and that there is no causal relationship running from economic inequality to reduced social welfare. Even then, we might still think inequality objectionable either by virtue of how it emerged or by virtue of other consequences that it has. We discuss the former consideration first.

Historical injustice

First, it is important to recognise that before we even consider the arguments about equality of opportunity or efficiency sketched above, a major factor shaping inequality in our own societies is our history of injustices such as colonialism, unjust wars, and slavery. The UK certainly has not emerged from this history with 'clean hands'. There is a need to address this historical legacy of the use of illegitimate force and violation of human rights, perhaps through reparations. As Frantz Fanon sharply put the point with respect to Western colonialism: 'Colonialism and imperialism have not paid their score when they withdraw their flags and their police forces from our territories' (Fanon, 2001 [1961], 79–80). Moreover, not all historical injustice lies outside the borders of major colonial states. Land ownership in the UK is very unequal, and forcible and unjust appropriations have played a major role in establishing the present distribution (Shrubsole, 2019).

Many historical injustices are quite recent and continue to have major effects in shaping inequalities today (Mills, 1997). For example, one of the largest disparities in the US between black and white people concerns the amount of wealth they have. For most Americans, their wealth largely takes the form of owning a home. But African Americans were denied the ability to purchase homes well into the 20th century, and even where they could qualify for loans they were steered into less desirable neighbourhoods. Black and Asian immigrants to the UK in the post-war period suffered discrimination in the housing market (Hiro, 1992, 28–9). Measures addressing historical injustice, such as reparations, can be expected to have an impact on today's inequalities.

Group-based inequalities, unequal opportunity and relational equality

These comments on racial inequalities underscore the significance for inequality of group memberships. In addition to race, these apply along lines such as gender, social class and disability. These group-based inequalities are typically objectionable in terms of both their causes (our focus in this section) *and* their consequences (the focus of Section 5). In terms of their causes, for example, they frequently reflect discrimination and unjust exclusion (sometimes connected to the way historical injustices have shaped our societies). In terms of consequences, they reinforce and deepen various inequalities in the status and power of members of the relevant social groups, a prime concern for the relational egalitarian (and which of course can produce and reproduce unequal opportunity).

In the UK, racial inequalities in poverty, pay, employment, education and assets are significant. Members of black and the main other non-white racial and ethnic groups are on average disadvantaged in all these areas, although members of many of these groups have better educational attainment than white people from similar social backgrounds (Platt and Zuccotti, 2021). Inequalities can be partly explained by differences in social class and in some cases by being relatively recent migrants to the UK. But the differentials cannot be explained entirely in these ways. There is clear evidence that discrimination in the labour market, in education and in housing plays a significant role in generating these inequalities (Khan, 2020). These inequalities have consequences, in turn, for the status and power of individuals in these groups, as well as for their well-being and health. In the US, a recent study of Chicago neighbourhoods shows that poor black children are overwhelmingly more likely to grow up in neighbourhoods with concentrated violence, high rates of incarceration and lead exposure than their equally poor white counterparts. This difference in exposure likely accounts for a large percentage of disparities in intergenerational income mobility between black and white people (Manduca and Sampson, 2019). These background inequalities give important context to the racialised inequalities in sickness and death in the UK and US during the COVID-19 pandemic (see House of Commons Women and Equalities Committee (2020) on these inequalities in the UK).

Let us now consider gender. In the UK, there is clear evidence that women are at an economic disadvantage to men in terms of pay, income and wealth, despite the fact that women have had better educational attainment for some time (Hills, 2010, 219–20; Costa Dias, Elming and Joyce, 2016; Brett and Lawrence, 2020). The gendered division of labour around childcare is a major source of the inequality but discrimination is likely a factor too (and of course can be related to the gendered division of domestic labour in that employers may select against women in hiring or promotion in expectation of them taking up a childcare role). Women who leave employment to provide childcare thereby become more economically dependent on their husbands, creating an unequal power relationship inside the family (Okin, 1989).

Let us also consider disability. A 2017 report of the Equality and Human Rights Commission points to the substantial disadvantages of disabled people in the UK in terms of educational attainment, employment, pay, risk of poverty, adequate housing and many other respects. The report discusses the continued prevalence of negative attitudes towards disabled people (Equality and Human Rights Commission, 2017, 134–7; see also Ryan (2020)). Economic disadvantage may in part result from, and work to reinforce, these attitudes, which indicate the less-than-equal status of disabled people in UK society. And, again, these background inequalities are part of the context for understanding the disproportionate impact of COVID-19 on the health and well-being of disabled people (Oung and Elias, 2020).

Social segregation, due to factors such as race and social class, is also consequential for equality in another way. When people's lives are radically separated from one another, and they consequently lack understanding and empathy for the other's circumstances, the idea that we are 'all in it together', that we are a democratic 'people', becomes difficult to sustain. It is not just that the rich can afford luxuries. The rich are also unlikely to sit in the same doctors' waiting rooms, have their children attend the same schools, or travel in the same train compartments as those in the bottom quintile of society. The current levels of inequality in many countries mean that the rich and poor live in different worlds. Yet, arguably, every democratic society requires certain experiences and institutions where everyone is treated the same. Otherwise the rich lose touch with the rest of society. This reinforces ignorance and exclusionary attitudes, and so undermines equality of status.

Market imperfections and unequal bargaining power

While the market transactions celebrated by economists involve free and knowledgeable adults transacting on their own behalf, many markets are not like that. For example, some markets involve parties who have highly unequal or inadequate information. And some markets involve one party making decisions on behalf of others, often without their consent (Satz, 2010). As an example of the first type, consider those in the US who purchased sub-prime mortgage loans without understanding the terms of those loans, which were usually buried in obscure language. As an example of the second type, consider dictators transacting on the international market in ways that saddle their populations with debt, or trade away the country's natural resources (Wenar, 2015).

There are also inequalities that arise on the basis of monopolies. Some monopolies are 'natural' in that they emerge where competition would do little to lower costs. It makes little sense to run two parallel pipelines to deliver water to a community, for example. But some monopolies occur because laws erect barriers to the existence of new firms. And in other cases, large firms can command an advantage which stifles the market forces that would usually generate competition. The late 20th and early 21st centuries have seen the rise of enormous monopolies (e.g. Facebook, Apple, Amazon) whose scope and depth are increased by new technologies. Monopsonies – markets in which there is a dominant buyer – can also arise. In labour markets, for example, employers with monopsony power can push wages and employment below competitive levels.

Where monopoly and monopsony power exist, trade unions can serve as a source of 'worker power' that enables workers to share in monopoly 'rents' and/or to limit monopsony 'rents' at workers' expense. It has been argued that the weakening of worker power in the US since the 1970s, in part due to the way policy has discouraged unionisation, is the cause of a decline in labour's share of national income, and the rise in corporate profitability. These developments in turn contributed to higher income inequality (Stansbury and Summers, 2020).

Market imperfections and associated inequalities in bargaining power infect the justification of the inequalities in income and wealth that a capitalist society produces. Obviously, if you have more than me simply because you unfairly skewed the rules in your favour, then the resulting inequality between us is unjustified.

There is a further point that should be made about a market system. All markets depend on background rules and property rights. Typically, in policy discussions, the burden of justification lies on those wishing to achieve a more equal distribution than that produced through the market. But why treat the 'free market' as a morally privileged baseline in this way (Rawls, 1999 [1971]; Murphy and Nagel, 2002)? After all, this is just one possible set of economic rules from a wide range of possibilities that citizens in a democracy might choose. In addition, as democratic citizens we might well think that certain goods should not be provided by the market, or that aspects of goods provided by the market should be partly de-commodified. T. H. Marshall articulated the thought that there is a realm of equality that markets must operate within, writing that 'Social rights in their modern form imply an invasion of contract by status, the subordination of market price to social justice, the replacement of the free bargain by the declaration of rights' (Marshall, 1950).

5. Objections to inequality: unfairness in the consequences of inequality

This last point means that when we, as democratic citizens, choose our society's property rules we ought to consider broadly the *consequences* of the inequalities that some rules would produce. We have already noted some unfair consequences above, such as in our discussion of the impact of racial and gender discrimination. These unfair consequences can also include the following.

Unequal opportunity for political influence

Although democratic citizens are formally equal, having equal rights under the law, and equal political rights, what use people can make of their rights is largely a function of their resources. One area in which this unequal use can be of huge consequence is politics itself. Unequal resources can transfer over to inequality in citizens' opportunities for effective political influence. This is an unjust consequence of economic inequality – and of course might itself in turn become an unjust source of economic inequality.

In the UK, the Democratic Audit project has pointed to some of the channels by which resources can impact politics. The better-off and large businesses have more resources to put into lobbying elected politicians (Dunleavy, Park and Taylor, 2018, 116). Political parties rely heavily on donations to fund their expenses, including election campaigns, but these are by no means spread proportionately across parties – the Conservatives got 50% of all donations 2013–17 (Dunleavy, Park and Taylor, 2018, 110). There is a clear link between major donations and becoming a member of the House of Lords, the UK Parliament's second legislative chamber (Dunleavy, Park and Taylor, 2018, 110). Studies of the US political system have attempted to directly gauge the influence that different income groups have on policymaking, with results that point to the lack of responsiveness of policymaking to those with low incomes and substantial responsiveness to the better-off (Bartels, 2008; Gilens and Page, 2014). While millionaires make up 3% of US households, more than 50% of the US Congress in 2020 has a net worth of over $1 million according to data from their financial disclosures.

It is worth elaborating on the value of political equality at work here. It is framed in terms of equal *opportunities* for effective political influence, not equal political influence. Some inequalities of political influence are arguably acceptable – for example, because some choose to devote more time and efforts to politics. But it is unfair if some citizens have greater opportunities for such influence than others *simply because they are wealthier*. On a relational view of equality, economic inequalities are tolerable to the extent that the equal standing of citizens is assured. But how can such equal standing be assured when those with money can disproportionately shape the political agenda and policy outcomes?

One possible response to this question is to emphasise the importance of the *associational context* for democratic politics (Cohen and Rogers, 1995; Young, 1995). Historically, for example, labour unions and other popular associations have arguably offered some balance to the influence of the wealthy and of business corporations in democratic politics (Ahlquist, 2017; O'Neill and White, 2018). But as we indicated in Section 4, in our discussion of unequal bargaining power, there has been a notable decline in unionisation in nations such as the US and the UK in recent decades.

Non-inclusive growth and the failure of reciprocity

Reciprocity, in general terms, requires that those who benefit from the efforts of others should themselves provide benefits for these others, if they have capacity and opportunity to do so. Reciprocity is an important element of social justice in its own right (White, 2003). Experimental work in behavioural psychology suggests that people care deeply about reciprocity in this sense; they are willing to pay a price in order to penalise those who 'free-ride' on their contributions. Such third-party behaviour has the effect of reinforcing reciprocity and, thereby, promoting mutually beneficial cooperation over the long run (Bowles and Gintis, 2002).

The idea of *reciprocity failure* – of people not reciprocating when they ought to – is perhaps most familiar in contemporary public discussions of cash benefits. It is widely thought that benefits should be linked to an obligation to look or prepare for employment. This can be seen as reflecting the idea that every person should 'do their bit' productively and not seek to live off the work of others.

However, the demand for reciprocity in this sense seems reasonable only if it is understood as an obligation to do one's bit as part of a generally fair scheme of economic cooperation (White, 2003, chapter 4; Shelby, 2018, chapter 6). Where the wider economy lacks fairness in its structures of opportunity and reward, the demand for work as reciprocity requires unfairly disadvantaged workers to work even though other, more advantaged citizens have not made good on *their* obligations to ensure fair opportunities and rewards. As a matter of fairness, we cannot impose one-sided obligations: there is a failure of reciprocity by the better-off as well. Consider, as an example, the effort to make cash benefits for disabled people more conditional on work-related activity (Baumberg Geiger, 2017). If the wider society is not making sufficient steps to address the injustices that disabled people face in employment (see the second subsection of Section 4), or legislates conditionality requirements that are not sensitive to the capacities of individual disabled people, then we have a one-sided application of reciprocity.

In thinking about reciprocity failure, therefore, we should give more consideration to the way reciprocity can fail due to inequalities in the way the wider economy is structured. Inequalities in wealth and power can create a context in which social relationships fail to respect reciprocity as the powerful extract benefits from others without helping to create just opportunities or giving a proportionate return.

Radical critics of capitalism, such as Karl Marx, argue that exploitation of this kind is integral to capitalism as such (Marx, 1990 [1867]). But one does not have to endorse Marx's economic theory to think that a worrying reciprocity failure arises when the benefits of economic growth are very unequally distributed. In the United States the benefits of economic growth have been highly concentrated at the top of the income distribution since the 1980s. One recent study finds that while average income increased by 60% 1980–2014, the post-tax income of those in the lowest 50% of the income distribution increased by only 21%, and that of those in the lowest 20% by only 4% over this entire period. At the same time, average post-tax income increased faster than average at the top of the income distribution, especially for those at the very top, the top 1% (Piketty, Saez and Zucman, 2018). Over this long period people in low income groups have continued to contribute to the economy, but have not reaped much improvement in their living standards from this, while better-off groups have done much better. This is growth without reciprocity.

There can also be a regional dimension to this. As Agrawal and Phillips (2020) show, productivity and earnings are significantly higher in London than elsewhere in the UK, and in recent decades house prices have increased much more in London and the South East than elsewhere, generating a rise in wealth inequality between regions.[12]

Where growth is non-reciprocal this can in turn feed into some of the other issues we have addressed around stability, health and well-being. For example, though the causes are complex, there is strong evidence to suggest that the exclusion of working people from the benefits of economic growth provides part of the context for growing health problems in the US, first affecting working-class black communities and more recently working-class white people (Case and Deaton, 2020). There is some evidence that similar problems are starting to affect the UK (Case and Deaton, 2020, 282–3).

[12] Although the high cost of housing means that median income after housing costs in London is no higher than the UK average, and its after-housing-cost income poverty rate is relatively high.

6. Objections to egalitarianism

We cannot necessarily conclude from Section 3 that we ought to reduce inequalities because there might be outweighing moral objections to doing so. Here we consider – and reject – three moral objections to inequality-reducing policy.

Equality versus liberty?

A common argument against proposals to reduce inequality is that they curtail individual liberty. Consider 'redistribution' through the tax–benefit system. The critic argues that when we redistribute income we use state coercion to force some people to transfer resources to others, thereby reducing the liberty of those subject to this coercion. Perhaps this does not invalidate any and all redistribution, but the critic argues that it points at least to an equality–liberty trade-off; and that respect for the liberty side of the trade-off will require us to hold back on the extent of equality-promoting redistribution.

In responding to this objection we need first to clarify what we mean by liberty. Liberty is an empty abstraction until it is given actual functional definition. For example, your freedom to blow cigarette smoke wherever you like interferes with my freedom to be in situations where I am not subjected to smoke blown in my face. Constraining your liberty here means enlarging my liberty and vice versa. This, as we shall show, is a crucial point. We have reason to care about the distribution of liberty as well as the extent of liberty.

Taking the critic's viewpoint, liberty seems to consist in: being able to act as one wishes (or might wish to act) without being subject to coercive interference by others, particularly by the state. This corresponds to one understanding of what is sometimes called 'negative liberty' (Berlin, 1969). However, even if we adopt this view of liberty it does not in fact support the critic's argument against 'redistribution' to reduce inequality. To see why, imagine a free-market system with zero taxation and no redistribution of income or wealth. Would this system place any restrictions on individual liberty (in the negative sense)? Of course it would. If a relatively poor person attempted to perform an action using resources that are the property of others, they would be subject to coercive interference by the state to stop them doing this. This is the enforcement of the private property rights people acquire in the free-market system. One person's liberty stops at the door, as it were, of other people's property (Waldron, 1993). In a world where all resources were owned privately and a particular individual owned nothing, they would not be able to perform any action without being subject to coercive interference by others, since every action they might wish to make would entail a claim on property belonging to others. This is not necessarily to criticise the institution of private property. But it is to point out that distributions of private property also shape the distribution of negative liberty. Imagine now that the state taxes wealth holdings and passes the proceeds to those with least wealth. In doing this, the state configures a different distribution of property and thereby also changes the distribution of liberty – the ability to act as one wishes or might wish without being subject to coercive interference by others. And this is the key point: so-called redistribution is not a matter of reducing liberty for the sake of greater equality. It is (or can be) a way of achieving greater equality in the distribution of liberty – 'negative liberty' – itself.

'The worst thing that can happen to one in relationships between man and man', wrote Jean-Jacques Rousseau, 'is to find oneself at the mercy of another' (Rousseau, 1984 [1755], 125). The focus on living 'at the mercy of another' lies at the centre of the so-called 'republican' conception of liberty (Pettit, 1997; Skinner, 1998) and resonates with the view of relational equality we discussed earlier. The paradigm case of republican unfreedom is slavery, the slave being someone who is wholly at the mercy of another. Freedom, the antithesis of slavery, is the status of not being at another's mercy, of not being subject to another's power of arbitrary interference, the power to interfere as they wish, according to their whim. If we accept this view of freedom, then there is certainly always a danger that the state can be a dominating presence, a risk that calls for careful structuring of the state in terms of checks and balances and individual rights to contest decisions. However, even in the absence of slavery, there is also a serious danger of domination emerging within the economy and civil society. As Rodbertus put it, 'Hunger makes a good substitute for the whip' (quoted in Böhm-Bawerk (1890, 334)). Background rules about property and entitlements powerfully influence the structure of coercion in a society. The fact that someone makes a choice does not mean that the person was not coerced. Robert Hale noted that even a slave makes a choice as the compulsion which drives him operates through his own willpower (Hale, 1943, 606).

In an important recent analysis, Elizabeth Anderson explores the very considerable discretionary power that employers in the US frequently have over their employees not only within the workplace but stretching to many aspects of life outside of the workplace (Anderson, 2017). Against this, it might be said that, unlike a slave, a wage worker always has the freedom to exit a job and thereby escape the dominating relationship. Indeed, this very threat of exit may discourage the employer from exercising their powers. However, if we stress the importance of exit power as a bulwark against domination in the workplace, then we begin to see one way in which a more equal distribution of wealth can help to enhance individual liberty. For the power to exit is affected by how costly it is to leave a given job. Where a worker has no assets to fall back on, the costs of exit might involve a risk of immediate poverty that they cannot afford. If assets are distributed so that all have some wealth, and thereby some income independent of work, then everyone has a degree of exit power and protection against workplace domination.[13] A similar argument can be made in the family/household context where women need resources to be free from domination by their husbands (Okin, 1989, chapter 7).

The claims of meritocracy?

Above, we pointed out some of the shortfalls of meritocracy and suggested reasons why strong meritocracy is not a compelling ideal. While meritocratic societies are improvements over aristocratic societies, they also tend to traffic in ideas about unequal human worth (Sandel, 2020). They too can harden into self-reproducing elites. But suppose we acknowledge that meritocratic values have a place in justifying differential outcomes; surely, I want to hire the competent plumber and not the incompetent one. Equality-promoting action conflicts with meritocracy which says it is fair that people be rewarded according to their efforts and abilities (Miller, 1999). Economist Greg Mankiw has further argued that promoting equality is wrong when it conflicts with the principle that people should be compensated in terms of what they deserve (Mankiw, 2013). But for reasons that Friedrich Hayek pointed out, 'desert' here cannot mean moral desert (Hayek, 1960, chapter 6). Markets are not responsive to whether people are morally deserving: they reward the efficient racist and punish the altruistic bumbler who is poor at planning. So 'desert', especially in the economic context, must mean something like 'productive contribution'.

While it is true that some markets do track such contributions, in the very specific sense of rewarding workers according to the market-determined value of their marginal product, it is important to recognise the real-world limits of application. As we have seen, many market

[13] A similar effect might be had by guaranteeing a universal income independent of employment through the tax–benefit system. See Van Parijs and Vanderborght (2017).

‘imperfections’ mean that many people get rewards they do not ‘deserve’: the monopolist does not deserve his outsized profits while manufacturing shoddy goods. Second, in many cases a person’s productive contribution is difficult to untangle from the productive contributions of others with whom she is cooperating. In a complex society, almost no one contributes in isolation and almost all production involves cooperation with others. Paying attention only to an employment contract at a given time leaves out all the social factors which put a person in a particular bargaining position. It also leaves out the luck that accompanies bargaining position – how scarce the person’s skills are at a given time. The same productive contributions will be in greater demand and command a higher price the scarcer they are. Third, the most compelling case for ‘desert’ involves the selection of people for demanding, complex jobs that are socially valuable. But it is possible to separate, at least partially, that process of selection for such positions from the question of the size of the rewards that attach to these. While incentives can be justified, the size of the incentives that are justified depends on many factors including the number of qualified people, the intrinsic goods of the position, procedural fairness and, indeed, the prevailing cultural attitudes about the justification of inequality. Fourth and finally, from a relational perspective, we should be critical of a meritocratic ethos that attaches itself so strongly to the idea that our compensation and standing in life are ‘deserved’. It is a short step from that idea to the conclusion that those who do not fare well ‘deserve’ their fates. This can lead those who win out in desert to smugly look down on those ‘losers’ who just cannot hack it. Michael Young, who invented the term ‘meritocracy’, saw it as leading to social calamity (Young, 1958).

The politics of envy?

A third objection to the concern for equality is that it allegedly reflects the vice of envy. The poor resentfully wish for the benefits enjoyed by the rich. They would be more virtuous if they focused on getting on with the life open to them. The egalitarian, however, panders to the poor’s resentment.

Given all that we have said above, however, it is clear that the envy objection rests on a very narrow, inadequate characterisation of what motivates egalitarianism. The ‘poor’ and the ‘rich’ are not natural categories, but created politically through the laws and policies of states. To question the existing laws and policies is not necessarily to express envy but to press for justification of these laws and policies in terms of values such as justice.

Is the desire for ‘justice’ itself motivationally suspect? In his *On the Genealogy of Morals*, Friedrich Nietzsche characterises concerns for justice as expressing a ‘slave revolt in morality’, an attempt of the ‘weak’ to bring down the ‘strong’ and ‘noble’, born from the *ressentiment* that the weak feel for the strong and noble (Nietzsche, 1989 [1887]). At its core, the will to achieve ‘justice’ is seen as expressing an unattractive desire to deny others their opportunity to flourish – and so is essentially life-denying.

The desire for justice, however, can surely have a more positive impetus and meaning. Consider, in this connection, Frederick Douglass’s account of his experience as a slave in the early 19th century US South and his escape from slavery (Douglass, 2009 [1845]). One thing that shines through is how, as a child and a young man, Douglass acquired a strong sense of the rich possibilities of life and of how these had been arbitrarily closed to him on account of his race. His escape from slavery, and his subsequent political activism to abolish it, is clearly rooted in this *life-affirming* spirit. Related to this, Douglass does not crave what the slave-owners have as slave-owners. He is not envious. He expresses a mixture of anger and pity for them – constantly embroiled as they must be in cruel efforts to retain control of those they have enslaved.

To rebel against an inequality that puts one at a disadvantage can thus be an expression of one's own love of life and desire to make the most of it. To support such rebellion from a more privileged position, moreover, is not necessarily a symptom of a life-denying asceticism either. It can derive from an empathetic recognition of how life's great possibilities are frustrated for others and a choice to stand with them as an expression of solidarity. It can be liberating to oneself too, to relinquish the burdens of working to perpetuate an unfair inequality from which one benefits.[14]

7. Conclusion

This chapter has laid out a set of reasons for concern with inequality. Although some of these reasons are focused on economic considerations, others primarily concern how economic considerations affect or are affected by non-economic considerations and concerns. Chief among these concerns has been the way that economic inequality undermines democratic institutions and values, including fair opportunity for political influence, fair equality of opportunity, and equality of status and power.

Because we point to a plurality of reasons to be concerned with inequality, our account is complex. This arguably makes our approach less tractable than more simple one-dimensional alternatives. For example, it is surely simpler to adopt a single focus on income inequality without looking at its effects on specific institutions or particular aspects of life such as health, social relations and political influence. But we believe that it is possible and better to develop richer models for measuring those aspects of inequality that matter. This can lead, in some cases, to more tailored policies than income transfers, such as benefits in kind (though income transfers are often better), or different ways of accomplishing income transfers. It might suggest the need to focus on wealth as well as income. It might suggest the need to focus on policies that shape the associational context of economic and political life, such as levels and patterns of unionisation.[15] And it is worth bearing in mind that one person's simplification for the sake of tractability is another person's life.

While there is often a gap between moral and political argument and policy – feasibility, political will, and path dependence are among the sources of that gap – our account does suggest the need for those concerned about economic inequality to keep a broad focus that includes wider human capabilities, social institutions, motivations and democratic institutions. Whether general tax and transfer measures are the best instruments for redressing these larger concerns, or whether more targeted and tailored policies are best – including removing some goods from the market and supplying them to all as entitlements – depends not only on evaluative considerations but also on empirical findings that this review will contribute to.

[14] Indeed, according to some scholars, Nietzsche himself would endorse a democratic ethos grounded in a life-affirming attitude and connected to a personal project of creative self-development (see, in particular, Owen (2002) for a more detailed discussion).

[15] Our argument that egalitarians need to attend not only to distributional outcomes in terms of income, but to wealth, power and civic status, and that they should not overstate the role of cash transfers to reduce inequality, but focus on a wider range of measures, potentially including the role of associations such as trade unions, has much in common with at least some of those arguing for an egalitarian strategy based on 'predistribution'. For discussion, see O'Neill (2020). Our approach also has some common ground with Pearce (2013).

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