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Part I

The New Equality Agenda

1

New Challenges to an Unequal World

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

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

An unequal world

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

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

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

Inequalities of resources

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

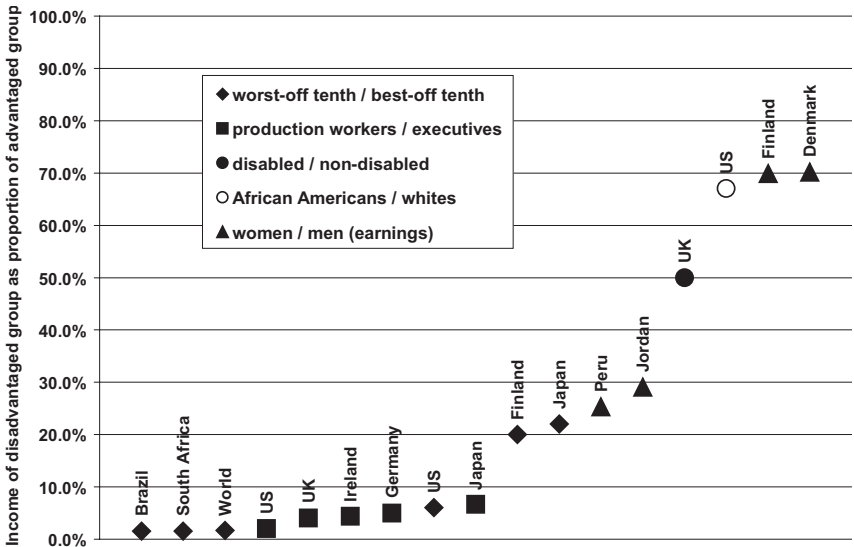


Figure 1.1 Selected inequalities of income
Sources: see text

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

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

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

Inequalities of respect and recognition

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

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

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

Inequalities of love, care and solidarity

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

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

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

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

Inequalities of power

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

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

Inequalities of working and learning

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

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

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

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

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

Patterns of inequality

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

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

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

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

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

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

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

Responses to inequality

Responses by social movements

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

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

Responses by states and interstate organizations

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

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

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

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

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

Responses by the academy

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

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

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

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

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

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

Equality Studies as a response to inequality

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

Central questions of equality studies

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

Guide to the rest of this book

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

Chapter 3 explains why we take equality to be the central value of progressive politics. Chapter 4 analyses the contexts within which equality and inequality are created and reinforced, and sketches an account of the relationship between social systems and social groups.

In Part II, we turn to the institutional and policy implications of equality of condition. Chapter 5 considers some of the issues involved in promoting greater equality of income and puts forward an institutional proposal for doing so. Chapter 6 sets out a programme of participatory democracy as a way of institutionalizing equality in the political system. Chapter 7 considers some of the ways that the legal system has been used to protect, and occasionally to challenge, structured inequalities, and proposes some changes that would make it more amenable to the claims of subordinate groups, particularly in relation to laws about work. Chapter 8 turns to the education system and proposes a set of changes that would foster equality of condition in its various dimensions. Chapter 9 focuses on the field of research and sets out an egalitarian policy of emancipatory research. This choice of issues and contexts is of course only a fragment of the egalitarian agenda, based on what we feel we are best equipped to talk about. Some of the areas conspicuous by their absence are the global economic order, the family and criminal justice, and we have only touched on some other important areas such as the mass media. But we hope we have addressed a wide enough range of issues to indicate what a comprehensive treatment would look like.

In Part III, we turn to political strategies for advancing the equality agenda. In Chapter 10 we contrast the classic Marxist model of achieving social change with a social movement model, arguing that there is already a thriving, international equality movement that is rooted in a wide variety of struggles focusing not just on class but on gender, ethnicity, disability, sexuality and other relations of inequality. Chapter 11 addresses the ideological challenge facing the equality movement, and argues that we need to tap into those aspects of our shared beliefs that are currently downplayed by the dominant voices in the public sphere, in particular beliefs about care and interdependence. In Chapter 12 we discuss some strategic issues for the equality movement, including coordination problems, the role of political parties, working inside and outside the system, and the interplay of ends and means.

The struggle for greater equality belongs to a world-wide movement that has taken a variety of forms over the centuries. Although each of its participants engages in specific actions motivated by their own concerns and perspectives, we all have something to say and something to learn from others. In this book, we write from the experience of living in Ireland, which furnishes many of our examples. As a small country on the fringe of Europe with a post-colonial heritage, Ireland differs in many ways from large, powerful countries like the United States or Britain. But we do not

think that the fundamental issues of inequality and oppression are all that different. Perhaps the greatest apparent difference is the degree of cultural homogeneity that has characterized Ireland since the 1920s, but even in this respect there are important cultural conflicts beneath the surface, the most striking of which is the treatment of Travellers by the settled population. There are much more important contrasts between the problems Ireland faces as a stable liberal democracy with a high standard of living and those faced by countries with very different political institutions or mass destitution. For that reason, and out of reluctance to join other privileged Northerners in preaching to the South, we address ourselves primarily to problems of inequality within well-off democracies. We very much hope that our ideas resonate with the experience of others, North and South, but we leave it to readers to judge that for themselves.

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