

# Egalitarianism

*New Essays on the Nature and Value of Equality*

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# 1

## An Introduction to Contemporary Egalitarianism

**Nils Holtug and Kasper Lippert-Rasmussen**

### 1. What Is Equality?

During the 1980s, the number of homeless people in the United States grew rapidly. This was due, among other things, to the Reagan administration's severe cuts to the housing budget. In fact, by the end of the Reagan years the federal government was spending \$8 billion annually on housing. The Carter administration had spent \$32 billion annually at a time when homelessness was far less common (Singer 1993: 28).<sup>1</sup>

Most egalitarians would think that Reagan's cuts were unjust. This is because these cuts increased inequality. However, egalitarians would not be alone in objecting to Reagan's cuts on the grounds of justice. Most utilitarians would also be troubled, because they would think that the harm the homeless suffered was substantial and not counterbalanced by benefits to taxpayers. These utilitarians would conclude that the Reagan administration produced less total welfare than it could have done with a more generous housing budget and so acted wrongly.

The egalitarian explanation of why Reagan's cuts were unjust refers to equality whereas the utilitarian explanation does not. There is nevertheless a sense in which both egalitarians and utilitarians attach value to equality. In fact, all major normative political theories subscribe to equality in this wide sense. They share what Thomas

<sup>1</sup> The editors could easily have found examples of unjust redistribution in favour of the better off, which is closer to home from their perspective. However, they assume the typical reader of this volume will be more familiar with an American example.

Nagel (1979: 111–12) has referred to as ‘an assumption of moral equality between persons’, according to which equal weight should be given to each person. Thus, utilitarians assign equal weight to persons by taking their interests to be equally important and thus weighing them on the basis of their strength alone. Libertarians hold that everyone has an equal right to him- or herself and to private property. Democrats hold that everyone has an equal right to vote. And conservatives (and almost everyone else) hold that people are equals before the law.

Nevertheless, not everyone is an egalitarian. This is because egalitarians adopt a *particular* interpretation of the assumption of moral equality between persons. They hold that persons should have equal shares of goods such as resources or welfare, or perhaps equal access to, or opportunities to obtain, these goods. This is the kind of equality we shall be concerned with here.

Of course, other theories will assign instrumental value to equality: they will value equality where it promotes other values. Thus utilitarians might claim that, since money has decreasing marginal utility, we should aim for a significant degree of monetary equality (Hare 1981: 164–5). However, egalitarians do not value equality merely because it promotes other values. They value it *intrinsically*, that is, non-instrumentally or for its own sake.

On the face of it, egalitarianism seems a simple political ideal. Perhaps that is part of its attraction. However, as has emerged from the vast literature on egalitarianism since John Rawls published his pioneering work *A Theory of Justice* in 1971, equality is a complex notion that requires considerable elucidation. In this chapter, we shall provide a brief sketch of some of the key issues. We shall characterise egalitarianism by looking at its foundations, nature, value, and applicability. En route, we shall indicate where each contribution in this volume fits into this characterisation, and how, together, the contributions can be seen as part of an ongoing effort to define and defend a plausible egalitarian ideal for our time. Thus, this chapter aims to provide the big picture.

## 2. Equality of What?

A fully developed egalitarian theory will need to specify *what*, exactly, is to be distributed equally. In *A Theory of Justice*, Rawls suggested that the relevant distributive units are ‘social primary goods’: rights and liberties, powers and opportunities, income and wealth, and the social bases of self-respect. These are things any rational person is presumed to want, irrespective of her particular plan of life (1971: 62; 1982).

However, what really sparked the ‘equality of what?’ or ‘currency of egalitarian justice’ debate was a pair of articles by Ronald Dworkin (1981*a, b*), published ten years after the appearance of Rawls’s *A Theory of Justice*. In these articles, Dworkin

distinguishes between *equality of welfare* and *equality of resources*. Equality of welfare initially seems an attractive view. Egalitarians are concerned with how well people fare relative to others. And it seems plausible that the relevant distributive unit should be whatever ultimately matters with respect to how well people fare, i.e. welfare. Resources, by contrast, are important only insofar as they lead to welfare.

Consider income, which is one of the items on Rawls's list of social primary goods. People seek an income, not because they take money to have intrinsic value, but because money can be spent to improve the quality of their lives. It would seem, then, that egalitarians should care about equality of welfare.

Again, to see the appeal of equality of welfare, consider a case in which two people have the same income. One has a disability that requires her to spend most of her money on buying expensive medicine. This means that she has less money to spend on food, housing, and other necessities. Suppose also that, therefore, she has a lower welfare than does the other person. Is that tolerable from an egalitarian perspective? Should we not compensate the disabled person for her extra expenses? Equality of resources fails to explain the disquiet behind these questions, because the two people already *have* the same income. The disquiet is explained by our pre-theoretical leaning towards equality of welfare.

Dworkin nevertheless believes that ultimately equality of welfare should be rejected. One of the reasons he gives is that this theory does not hold people responsible for their choices, including their expensive tastes:

Imagine that a particular society has managed to achieve equality of welfare . . . Now suppose that someone (Louis) sets out deliberately to cultivate some taste or ambition he does not now have, but which will be expensive in the sense that once it has been cultivated he will not have as much welfare . . . as he had before unless he acquires more wealth. These new tastes may be tastes in food and drink: Arrow's well-known example of tastes for plovers' eggs and pre-phyloxera claret. (Dworkin 1981a: 229; see also 1985: 206–8)

The point is that to achieve equality of welfare, one would have to devote more resources to Louis than to a person with cheaper tastes, say for beer, sausages, and chips. But surely a plausible ideal of equality would not require us to compensate people for acquiring expensive tastes?

In response to this point, Dworkin develops a theory of equality of resources. Unlike Rawls's theory, this theory compensates people in the sort of case described above, where two people have the same income but one is nevertheless rendered worse off by a disability or some other natural disadvantage. And unlike equality of welfare, this theory holds people responsible for their choices.<sup>2</sup>

<sup>2</sup> Incidentally, Rawls's theory does not hold people fully responsible for their choices either. According to Rawls's difference principle, the worst off should be maximally compensated whether or not their being worst off reflects their own choices.

To hold people responsible for their choices, Dworkin devises a hypothetical auction in which people bid for available resources from a platform of equal purchasing power. At the end of the auction, everyone will have a bundle of resources. The resulting distribution should satisfy what Dworkin calls the envy test for equality: No one prefers someone else's bundle of resources to his or her own (Dworkin 1981*b*: 285). Had someone preferred another bundle, he could have made a bid for it himself. Importantly, this conception of equality holds people responsible for the choices they make, both during and after the auction. If some bidders decide to buy Ferraris rather than to invest, or to buy leisure rather than to work, and so end up with fewer resources than others, that is their choice and they should not be compensated.

However, as Dworkin points out, the auction does not yet accommodate the intuition that people should be compensated for deficits involving 'internal' resources. Consider again the disabled person. She will have to spend a significant portion of her equal initial share on medicine, so she may not have much money left to buy other resources. Dworkin deals with this problem by devising a hypothetical insurance scheme, where people can insure themselves against disadvantages with respect to their internal resources such as disabilities and lack of talent. They are then asked how much of their initial purchasing power they are willing to spend on such insurance. To secure impartiality, they are to insure themselves from behind a veil of ignorance, where they face an equal chance of having the relevant disadvantages. Those who turn out actually to have the disadvantages when the veil is lifted are then compensated on the basis of what people on average have been willing to insure for (Dworkin 1981*b*: 297–8). Finally, the auction is run on the basis of this new distribution of purchasing power, where those who have natural disadvantages have a higher share than others.

Dworkin's theory has been criticised in various ways. In Chapter 13 in the present volume, Susan Hurley focuses on different accounts of the importance of health for distributive justice. First, she makes the point that equality of welfare does not distinguish between persons whose inefficiency in generating welfare derives from their expensive tastes and those whose inefficiency derives from their ill health. In either case, people may be entitled to compensation. However, she then points out that Dworkin's theory of equality of resources does not assign special significance to health either. Rather, health is on a par with other internal resources such as talents and is in competition with other goods. Equality of resources, then, does not attach special significance to health.

Another worry that has been voiced about Dworkin's account is that, in it, questions of responsibility are confused with the question of whether egalitarianism should take resources or welfare as its currency (Arneson 1989: 88; Cohen 1989*b*). Thus Richard Arneson has argued for a view he labels 'equality of opportunity for welfare'. This focuses on welfare and yet is intended to accommodate Dworkin's aim to hold people responsible for their choices. For equality of opportunity for welfare to obtain, people

must have equally good options in the sense that their options are equivalent in the prospects for welfare they offer. This allows Arneson to argue that people who have deliberately acquired expensive tastes should not be compensated, even if their tastes now render them worse off than others with respect to welfare. What matters is that, at some appropriate time, they had options that were as good as everyone else's, not whether they have in fact made good use of these options.<sup>3</sup>

This issue arises with regard to resources as well. That is, should people have equal shares of resources irrespective of their own responsibility for acquiring, or failing to acquire, those resources, or should their resources be adjusted to reflect responsibility? It can be seen, then, that the issue whether egalitarians should be concerned with welfare or resources, and the separate issue whether (and how) they should accommodate considerations about responsibility, cut across one another. Of course, much more can be said on the relationship between responsibility and equality. We shall give a more detailed account of it in Section 7.

While many egalitarians are attracted to Dworkin's equality of resources and other resource-based theories, many others are sceptical. Indeed it is interesting that seven contributors in the present volume operate either with welfare or opportunity for welfare. Apart from Arneson, this list includes Christiano, Holtug, Lippert-Rasmussen, McKerlie, Persson, and Vallentyne.

In the remainder of this introduction, we shall try not to assume any particular account of the currency of egalitarian justice. We shall speak mostly of 'goods' or of people being 'well' or 'badly' off. However, it will sometimes make a difference what currency is assumed, and where it does we shall be more specific.

### 3. Equality Between Whom?

Suppose a plausible answer has been given to the 'equality of what?' question. Next, an egalitarian will need to say who should stand in this relation of equality—in the favoured currency—to each other. Several issues need to be addressed here.

First, there is the question whether equality applies to *groups* or to *individuals*. Consider Rawls's difference principle. This principle states that social and economic inequalities are to be arranged so that they are to the greatest benefit of the least advantaged (Rawls 1971: 302). Furthermore, Rawls (1971: 95–100) specifies that by the 'least advantaged', he means the least-advantaged *group* (or the representative member of that group).

<sup>3</sup> For other accounts of the currency of egalitarian justice that are broadly speaking in the same ballpark as the welfare-based and resource-based theories mentioned, see e.g. Cohen (1989*b*), Roemer (1996), Sen (1995), and Vallentyne (2002).



Likewise, various issues of equality involving the sexes or ethnicity may seem to be questions about the equality of groups.

However, one may worry that such a focus on groups is unstable. That is, if we are worried about inequalities between groups of individuals, why does this worry not translate into a worry about inequalities between *members* of the group? Suppose that the level of goods for a particular group is its average; and suppose that the worst-off group consists of three members, for whom we can provide either of the following individual levels of goods: (1, 3, 5) or (3, 3, 3). Since both give an average of 3, the difference principle is indifferent. But to many egalitarians (3, 3, 3) is a better distribution.

Since it focuses on groups, Rawls's difference principle should be contrasted with leximin. Leximin is the principle that benefits to the worst-off *person* have priority over benefits to others (and if the worst-off person is indifferent, benefits to the second-worst-off person have priority, and so on). However, in their joint contribution to this volume (Chapter 7), Bertil Tungodden and Peter Vallentyne argue that it may be difficult to obtain a plausible definition of 'least-advantaged group' permitting significant deviations from leximin. This is an interesting result, not least because leximin is generally taken to assign too much weight to the least advantaged. It implies that we should forgo a huge benefit to the second-worst-off person simply to secure a tiny benefit to the very worst-off person even where the latter is only slightly worse off than the former.

Consider now the case of equality between the sexes; and suppose, simply, that all men are well off (and equally so), and that all women are badly off (again, equally so). This situation is represented as A in Figure 1.1. (The columns represent groups of men and women. The width represents the number of people in the group and the height represents how well off they are.) Compare outcomes A and B. The difference between them is that, in B, half the women have joined the better-off group and half the men have joined the worse-off group. And so with respect to equality between the groups of men and women, there is perfect equality in B. On average, women are exactly as well off as men are. Suppose also that in neither A nor B are the individuals involved here responsible for how well off they are. On that assumption, many will

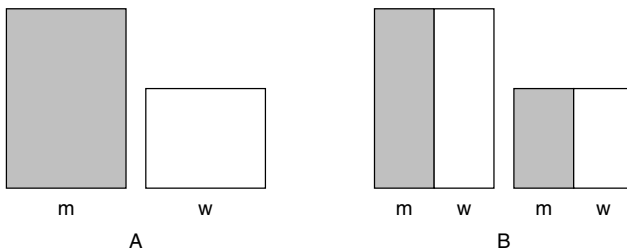


FIG. 1.1

argue that the inequality in B is just as bad as the inequality in A. They will infer that inequality between individuals is what ultimately matters, not inequality between groups: here, it is the fact that in both outcomes half the individuals are worse off than the other half through no fault of their own.<sup>4</sup>

A further question is whether the ideal of equality applies only *within* politically unified societies (such as states) or also *between* them. Of course, the answer to this question will have tremendous practical importance, because some of the greatest inequalities in the world today obtain between rich and poor countries. If we again look to Rawls (1971), he explicitly proposed his theory of justice as a theory for a single society. He did not intend his principles of justice to apply to the relations between states. And he has later argued that international justice does not require anything as strong as the difference principle (1993, 1999).

One could try to argue for 'local' rather than 'global' equality in various ways. One route would be via a contract argument. Along such lines, Rawls imagines that different peoples are represented in an original position in which they are to choose a set of principles of international justice. He argues that they would here agree on a number of fundamental liberty rights but not on any egalitarian ones. However, many have been critical of the idea that a contract in which the parties are genuinely free and equal can be used to rule out equality as a requirement of international justice in a world in which mutually advantageous transactions occur across the globe. In particular, Rawls's idea that the original position can be used to generate egalitarian principles domestically, but only non-egalitarian principles globally, has been subjected to a great deal of criticism (Pogge 1994).

Alternatively, it could be argued that there are other 'special relations' between members of a single society that do not obtain between members of distinct societies. However, it is not clear that there are any such relations. Nevertheless, there is a thesis that may provide a case for a different kind of local equality. This is nationalism. According to many nationalists, special relations obtain between co-nationals, and these relations generate special obligations (Miller 1995: 72). Therefore, it may be suggested that egalitarian concerns are owed exclusively, or at least primarily, to co-nationals. Note, however, that this claim differs in important respects from the claim that egalitarian concerns are owed primarily to members of one's own state. A single state may house different nations and a single nation may be spread out over several states.

Of course, nationalist claims are controversial. It is also worth pointing out that there are powerful resources within the egalitarian framework from which one can

<sup>4</sup> Note, incidentally, that even if one aims at equality between individuals rather than between groups, this does not preclude group-oriented measures to implement such equality. For instance, if there are social mechanisms that systematically prevent women from obtaining certain positions or benefits, group-oriented measures (say, affirmative action) may be a way of countering such mechanisms and so of achieving equality between individuals.

argue for *global* equality. Thus, in his defence of the difference principle Rawls himself appeals to the idea that non-deserved inequalities between individuals should be eliminated. We shall consider this eliminative aim—the aim of neutralising luck—in greater detail in Section 6, but let us here merely point out that no one chooses which society they are born in. Therefore, people cannot be said to deserve to be worse off than others as a result of their inherited location or nationality (unless, perhaps, they have had the opportunity to join a different society). Thus, Ethiopians have not chosen to be Ethiopians, and many egalitarians believe that therefore states that are in a position to help have an egalitarian obligation to do so.

Another ‘equality between whom?’ issue concerns the relationship between generations. Does the present generation have an egalitarian obligation not to pollute the earth because this will harm future generations, perhaps rendering them worse off than we are?

Rawls argues that the difference principle does not apply across generations. He refers to the contractualist view, briefly mentioned above, according to which obligations of justice presuppose mutual advantage. As he puts it: ‘We can do something for posterity but it can do nothing for us’ (Rawls 1971: 291).

However, this conclusion is in tension with another Rawlsian line of argument, namely, the one that appeals to the idea that people should not end up unequally well off as a result of morally arbitrary factors. Just as people do not choose *where* they are born, they do not choose *when* they are born. So concern about equality does indeed seem to apply to the relationship between generations. At any rate, future victims of pollution cannot be said to deserve to be worse off than the present generation.<sup>5</sup> In truth, the issue of justice between generations is notoriously complex, and we cannot usefully say anything more about it here.<sup>6</sup>

Finally, consider the issue of non-human animals. Do (some) non-human animals fall under the scope of equality or are we dealing with humans only? Peter Singer (1975) has famously argued that ‘all animals are equal’ and questioned factory farming and animal experiments. However, the doctrine of equality proposed by Singer is not an egalitarian one. He proposes merely that the assumption of moral equality between persons referred to earlier should be extended to non-human animals. More specifically, he proposes a utilitarian doctrine of equal consideration of the interests of all animals, human and non-human.

Egalitarians (proper) have generally had little to say about non-human animals. In the present volume (Chapter 9), Peter Vallentyne aims to rectify this. As he points out, the issue of non-human animals is both important and potentially worrying

<sup>5</sup> The tension between these two Rawlsian lines of thought is a theme in Barry (1989).

<sup>6</sup> For a discussion of some of the complexities specifically pertaining to equality and intergenerational justice, see Temkin (1992).

for egalitarians. Thus, he argues that, given a number of plausible assumptions, egalitarianism implies what he calls the ‘problematic conclusion’, according to which morality requires a massive shift of resources away from most humans—even most of those with significantly diminished human lives—to most mice (and other sentient non-human animals). This is because, in general, mice have less welfare than humans, and because there seems to be no plausible reason why egalitarianism should not apply to mice. For instance, non-human animals cannot be disregarded on the basis of not possessing self-consciousness, because that would imply that infants and humans with severe cognitive disabilities also fall outside the scope of equality.

Vallentyne considers various possible answers here, including the possibility of simply embracing the problematic conclusion. He ends up offering a solution which, among other things, involves the idea that moral standing comes in degrees, and the further idea that most non-human animals have lower moral standing than most humans. Very roughly, their lower moral standing should be weighed against their having less welfare when we assess their egalitarian claim for resources (in fact, Vallentyne’s solution is much more subtle than this). It emerges that even if the claims of non-human animals for resources are sometimes stronger than the claims of humans, often they are not. And so, Vallentyne contends, egalitarianism does not imply the problematic conclusion. Yet it does extend to non-human animals.

#### 4. Equality When?

Egalitarians need to clarify the temporal span of egalitarian justice. What temporal extension, or period, of an individual’s life should we focus on when determining how well off she is? Consider two outcomes, C and D, in Tables 1.1 and 1.2. Each outcome contains two individuals, *a* and *b*, the numbers refer to their share of goods, and  $T_1, T_2, \dots, T_4$  are equally long temporal stages. In C, *a* enjoys a high level of 9 in the first half of his life and a low level of 1 in the second half; *b* enjoys the same levels, but the order is reversed. In D, on the other hand, each enjoys a constant level of 5 throughout his life. Is either of these distributions better than the other, in egalitarian terms?

Table 1.1

C	$T_1$	$T_2$	$T_3$	$T_4$	Total
<i>a</i>	9	9	1	1	20
<i>b</i>	1	1	9	9	20

Table 1.2

D	T <sub>1</sub>	T <sub>2</sub>	T <sub>3</sub>	T <sub>4</sub>	Total
<i>a</i>	5	5	5	5	20
<i>b</i>	5	5	5	5	20

Most egalitarians have assumed what may be called ‘whole lives egalitarianism’, according to which the goods relevant for assessing egalitarian claims are the goods accruing over an entire lifespan.<sup>7</sup> In both C and D, each of *a* and *b* have 20 such units. Therefore, whole lives egalitarianism implies that neither C nor D is better than the other with respect to equality: they are equally good. However, in a pioneering article, Dennis McKerlie has challenged this view (1989; see also Temkin 1993: 232–44). He claims that while C is marred by unjust inequality, D is not. At both T<sub>1</sub> and T<sub>2</sub> in C, *a* has 9 whereas *b* only has 1. And the fact that their positions are reversed in T<sub>3</sub> and T<sub>4</sub> does not simply nullify the badness of such inequality. In at least one respect, it adds to it.

This suggests that it matters whether people are equally well off at particular times. Furthermore, this intuition can be captured by egalitarian views that focus on stretches of time that are shorter than whole lives. For instance, time-slice egalitarianism implies that, at any point in time, it is bad if some people are worse off than others. And time-stage egalitarianism implies that it is bad if some people are worse off than others over certain stretches of time (where these stretches do not amount to whole lives). Both views imply that since *a* and *b* are unequally well off in each of T<sub>1</sub>–T<sub>4</sub> in C, and indeed at every point in time, C is worse than D.

Note, incidentally, that whole lives egalitarianism and, for instance, time-slice egalitarianism have importantly different implications with respect to the issue of intergenerational justice raised in the last section. According to whole lives egalitarianism, inequalities between individuals in different generations may well matter. For if the present generation pollutes enough, the entire lives of future individuals may well be worse than our entire lives. However, time-slice egalitarianism is concerned only with inequalities *at* particular time-slices and so does not give us a reason to regret intergenerational inequality.

On the other hand, unlike whole lives egalitarianism, time-slice egalitarianism necessarily creates an objection to simultaneous inequalities between age groups. If the young are now better off than the old, this implies time-slice inequalities. But it does not necessarily imply inequalities over whole lives. Those who are now old were once young, and those who are now young will one day be old (or so one would hope).

<sup>7</sup> See e.g. Rawls (1971: 78); Daniels (1996: 259–64); Dworkin (1981b: 304–5); Nagel (1991: 69).

Table 1.3

E	T <sub>1</sub>	T <sub>2</sub>	T <sub>3</sub>	T <sub>4</sub>	Total
<i>a</i>	9	9	9	9	36
<i>b</i>	1	1	1	1	4

It is doubtful whether time-slice or time-stage egalitarianism can simply replace whole lives egalitarianism. To see this compare C with E (Table 1.3). In respect of time-slice and time-stage inequality, E does not differ from C. However, from an egalitarian point of view, C certainly seems better. This point can be captured by whole lives egalitarianism. Over their entire lives, *a* and *b* are equally well off in C, whereas *a* is much better off than *b* in E. In view of this, it has been suggested that several theories of the temporal span of egalitarian justice will have to be combined.

In his contribution to this volume (Chapter 6), Dennis McKerlie reconsiders his earlier views about the temporal span of egalitarian justice. He points out that these views relied on certain controversial ideas, including the idea that we must assign moral importance to time itself and the idea that a temporal stage in a life is an appropriate locus of distribution.

Why do egalitarian views that focus on time-slices or time-stages rather than entire lives assign moral importance to time itself or facts about timing? They do so because, while it seems to matter whether people are unequally well off at particular times, it does not similarly seem to matter whether they are unequally well off at different times. If, for instance, two people are born on the same day and lead their equally long lives in tandem, so that at every point in time the welfare of the one equals the welfare of the other, it does not seem to matter that one is worse off in her old age than the other is in her childhood. Thus, what matters is *simultaneous* inequality. However, as McKerlie points out, he did not explain why time itself should have such significance. He simply appealed to our intuitions. Nor did he explain why time-slices or time-stages should be considered appropriate loci of distribution (again here, he appealed to our intuitions).

One turn an egalitarian could take in order to justify time-slice or time-stage egalitarianism involves appeal to Parfit's views about personal identity and what matters in survival (1984). However, McKerlie argues that this is not a plausible option. He suggests instead that perhaps some of the intuitions to which he was appealing are better captured by a different kind of view: prioritarianism. We shall examine prioritarianism in Section 9. For now a brief description will suffice. According to prioritarians, a benefit matters more the worse off the beneficiary is. Unlike equality, priority is not an essentially comparative notion. To assess the moral value of a benefit to an individual, we need only know how well off this individual is, not how well off she is in comparison to others.

McKerlie argues that since priority is, in this sense, not comparative, we can apply it to temporal stages in lives without making an additional case for holding that a temporal stage is an appropriate locus of distribution. Furthermore, we can avoid assigning moral importance to time itself. This is because it is plausible to claim that priority applies to time-slices or time-stages *whenever* they occur, that is, irrespective of their timing. If people have priority at times when they are worse off, it does not, in itself, matter when this is.

## 5. Measures of Equality

However we answer the questions ‘equality of what?’, ‘equality between whom?’, and ‘equality when?’, we will hardly ever be in a position to choose between a perfectly equal outcome and an unequal one. Rather, we will face choices between different unequal outcomes. To make these decisions, egalitarians need to know which unequal outcomes are worse than others from the point of view of equality.<sup>8</sup> As Larry Temkin has shown, this question turns out to be surprisingly complex (1993: 19–87; see also Rae 1981: 104–28).

We can illustrate the complexity by presenting an extract from Temkin’s intricate discussion of the so-called ‘sequence’. The sequence consists of 999 different, unequal outcomes in which the same group of 1,000 people exist. In every outcome, each person is either badly off or well off. The well-off people are equally well off across the different outcomes and so are the badly off people. The outcomes differ only in the number of people who are badly off and the number of people who are well off. In the sequence’s first outcome, one person is badly off and 999 are well off—the sequence’s ‘plentiful extreme’. In the second outcome, two persons are badly off while 998 are well off; and so on and so forth, until we reach the sequence’s last, dismal outcome in which one person is well off and 999 are badly off—the sequence’s ‘poor extreme’. This sequence is represented in Figure 1.2. The question now is which of these outcomes are worse than which others from the point of view of equality? Obviously, the plentiful extreme is better, from the point of view of total goods and, very probably, all things considered, but this is not to the point, which is how these outcomes compare from the point of view of *equality*. Two issues seem relevant to this question: who has a complaint about distribution, and how serious is this complaint?

With regard to who has a complaint, there are at least two plausible views. On the first, anyone who is worse off than average has a complaint. If, say, the relevant

<sup>8</sup> For a valuable account of different measures of inequality, see Sen (1997).

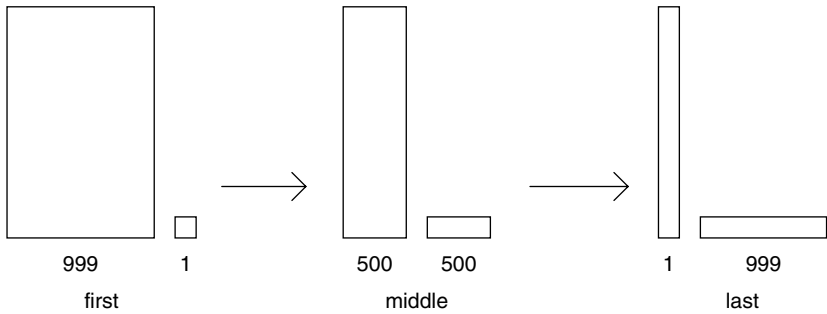


FIG. 1.2

goods are resources and the sum of resources is constant across different distributions, those who would benefit from an equal distribution would be those who were below the average. On the second view, anyone who is worse off than the best-off has a complaint. Again, there is something to be said for this view, since anyone who is worse off than the best-off person is, we can assume, worse off than this person through no fault or choice of his own.

Moving now to the question of seriousness, at least three views are *prima facie* attractive. On the first, the greater the difference between a person's level of benefits and the average level, the more serious is this person's complaint. On the second view, the greater the difference between a person's level of benefits and the best-off person's level of benefits, the more serious is this person's complaint. In support of both of these views, it might be observed that, on them, it is only when a person reaches the relevant superior level that he no longer has a complaint regarding inequality. On the third view, to determine the seriousness of a worse-off person's complaint, we should determine how many other people are better off than this person and by how much: the more people who are better off and the greater the gap between them and the person in question, the more serious is this person's complaint. The idea is that the more people who are better off than you through no fault or choice of your own, the worse; and the worse off you are compared to them, again, the worse.

With these suggestions in mind, let us now return to the sequence and assess the equality in the outcomes situated between the plentiful extreme and the poor extreme. One position is that the different outcomes become steadily better (with respect to equality). As the number of badly off people grows, it makes less and less sense for them to see themselves as a group singled out for unfair treatment. A remarkable implication of this view is that if we move from the distribution in which 100 people are badly off to the one in which only one person is badly off, we make things worse—not all things considered, of course, but in respect of equality. (Incidentally, this brings out that descriptive measures of equality are different from the sort of



measure that we are after here. For on a typical descriptive measure, for instance the Gini Coefficient, there is very little inequality in the outcome which is worst, according to the present measure of badness of inequality, since only a tiny fraction of the total amount of benefits needs to be redistributed to achieve perfect equality.)

Can this position on the badness of inequality be supported, and if so, how? Suppose we use a maximin principle to assess inequality. This principle says that how bad a given distribution is with regard to equality depends solely on the seriousness of the complaint of those who are worst off. Now the worst-off persons have a still less serious complaint if we accept either the first or the third view about the seriousness of complaints. As we move along the sequence to the poor extreme the gap between the worst-off person and the average person becomes smaller and smaller, and fewer and fewer people are better off than the worst-off person. Hence, on the maximin principle the outcomes of the sequence become steadily better.

Alternatively, it may be submitted that the outcomes become steadily worse. This submission might be underwritten by an additive principle of equality. On this principle, the badness of inequality can be determined simply by adding up the complaints of each worse-off person. On the assumption that the seriousness of a complaint is determined by how much worse off the person in question is relative to the best-off person, it follows that the outcomes of the sequence become worse, from the point of view of equality, as more and more people are badly off.

A third view says that the outcomes at first become worse and worse and then at some point start getting better and better. The reasoning behind this view might be the following. The first outcome is almost equal, except for one badly off person. We then move further and further away from this almost equal distribution until we reach the point where exactly half are badly off and half are well off. After that point it starts getting better, because as more and more become badly off we approach a distribution which is nearly perfectly equal, since everyone except one person is badly off. On this view, the extremes of the sequence are best from the point of view of equality.

We commit ourselves to this line of reasoning if we endorse the additive principle of equality together with the view that the seriousness of a worse-off person's complaint is determined by the distance between his level of benefits and all better-off persons' levels of benefits and by how many persons are better off. Given these assumptions, the first move in the sequence doubles the number of people who have a complaint and does not reduce the seriousness of the complaint of the first person by more than a fraction: the distance between the first worse-off person and the better off is not reduced, but the move reduces the number of persons who are better off from 998 to 997 and thereby the seriousness of his complaint by a fraction. When we have reached the middle of the sequence and move from the distribution in which the number of badly off people equals the number of well-off people to the distribution in which 501 persons are badly off, one more person has a complaint, which makes

the inequality worse, but this effect is more than offset by the fact that the seriousness of the very many, already badly off persons' (500) complaints is reduced by a fraction. This countervailing factor grows even stronger as we approach the poor extreme of the sequence.

These remarks by no means do justice to Temkin's rich discussion of measures of the badness of inequality (each of which he shows to have intuitive attractions). However, they well illustrate that the way in which we resolve this matter will have a serious impact on the ranking of unequal outcomes. In practical terms, it is not hard to grasp the importance of the fact that, on some views, we do not improve a situation by bringing some, but not all, of the worst off up to a level enjoyed by the best off, while on others we do.

## 6. Arguments for Egalitarianism

Much of the work on equality done over the last thirty years involves attempts to articulate cogent, intuitively correct accounts of equality. This work addresses questions like those asked in the last four sections. Egalitarians have tended to *assume* that equality, in one form or another, is desirable. They have thus tended to neglect the, in some ways, more basic question whether equality (in *some* form or other) is desirable.

Clearly, these questions are interpenetrating. One cannot say whether equality is desirable without an understanding of it. Nor can one construct an account of equality without some sense of the desirability that attaches to it, and in the construction process this sense will have to survive critical scrutiny. In this section, however, we want to try to isolate the desirability issue.

There are at least two kinds of argument for the claim that equality is intrinsically just or otherwise intrinsically desirable. One tries to derive equality from more basic moral values, perhaps in conjunction with additional assumptions. The other supports the ideal of equality by demonstrating that this ideal explains many of our considered moral judgments and, more generally, is a component in the most coherent account of our considered moral beliefs—that is, is incorporated in the moral judgments that would survive the auditing process leading to what Rawls calls 'reflective equilibrium'. For instance, when we compare two distributions of the same total amount of welfare, one of which is equal and the other of which is very unequal, many prefer the former to the latter. This might be taken to support the ideal of equality (as against, say, utilitarianism) in that equality explains this preference. This suggests, although by no means establishes, that equality would survive the process leading to reflective equilibrium.

However, even this weak claim has been resisted. First, it has been pointed out that other views explain this preference—for instance, prioritarianism. On this view, an equal distribution of welfare also has greater value than unequal distribution of the same sum. Second, egalitarians are committed to saying that it is in one respect better if everyone is equally badly off than if everyone is better off though not equally so. This claim is implausible, or so many have thought. When we combine these two observations, we see that our preference for the more equal distribution of welfare is better explained by priority than by equality. This may suggest that equality does not survive the auditing process leading to reflective equilibrium. Nevertheless, some observers would urge that it is not implausible to hold that levelling down is in one respect good. We will discuss this so-called ‘levelling down objection’ in greater detail in Section 8.

Turning now to attempts to derive equality from more fundamental moral principles, one argument that pops up at various places in the literature, although it has never been fully articulated and explicitly endorsed, grounds equality in a deeper aim of neutralising the effects of luck on distribution. One can find this line of thought in Rawls’s work. Rawls examines what he calls ‘the system of natural liberty’. This is a system in which formal equality of opportunity obtains in so far as ‘all have at least the same legal rights to all advantaged social positions’ and applicants are assessed on their merits alone (Rawls 1971: 72). He says, ‘Intuitively, the most obvious injustice of the system of natural liberty is that it permits distributive shares to be improperly influenced by these factors [i.e. social circumstances and such chance contingencies as accident and good fortune] so arbitrary from a moral point of view’ (1971: 71).

This passage may seem to suggest that, under a just distribution, luck—that is, factors that are arbitrary from a moral point of view—will not influence distributive shares (Rawls 1971: 72). G. A. Cohen appears to agree. He writes, for instance, that ‘anyone who thinks that initial advantage and inherent capacity are unjust distributors thinks so because he believes that they make a person’s fate depend too much on sheer luck’ (1989*b*: 932). This seems to indicate that the aim of neutralizing luck justifies equality and that the realization of equality will eliminate luck.

Let us set aside exegetical questions about the quoted passages and focus on the soundness of the argument itself. Susan Hurley has argued that if the aim of eliminating the influence of luck on the distribution of benefits were to justify equality, it would have to be the case that equality (as opposed, for instance, to utility maximisation, or maximising the position of the worst off) limits the influence of luck on outcomes. Unfortunately, this is not the case (Hurley 2003; compare Parfit 1991: 12). For surely an equal distribution might come about as a matter of sheer luck. If, for instance, we live equally good lives because by some cosmic accident we happen to have a combination of native endowments and environments that ensures that everyone lives equally good lives, luck and equality coexist; and clearly, this does not render

the equal distribution less just than it would have been if it had come about through collective social planning (Hurley 2003: 146–80).

In response to Hurley's observation, it might be urged that when luck-egalitarians write about 'neutralising luck' this really is shorthand for something like 'eliminating the differential effects on people's interests of factors which, from their perspective, are a matter of luck' (Arneson 2001; Lippert-Rasmussen 2005). This might indeed be so. However, as Hurley points out, if that is what is meant, it follows that no attempt has been made to justify equality through the luck-neutralising aim, and hence that in so far as we want to justify equality, we still need to do so. The reason is that, on the suggested reading, equality is treated as a default position deviations from which are unjust in so far as they are the result of luck. But then no reason relating to the aim of neutralising luck has been given for holding that equality (and not, say, the distribution that maximises welfare or the position of the worst off) should be the default position.

This criticism of the attempt to ground equality in a luck-neutralising aim might encourage us to look for an alternative basis of justification. Two options here are set out in this volume. Ingmar Persson (Chapter 3) argues in favour of an extreme egalitarian position according to which justice requires everyone to be equally well off (in terms of welfare). He points out that this position follows from the following two claims. First, a formal principle of justice to the effect that a state is just if and only if everyone is equally well off in it unless something makes it just that some are better off than others. Second, the negative claim that nothing makes it just that some are better off than others. The formal principle, Persson conjectures, is true on logical grounds: someone who was to deny it would manifest a misunderstanding of the concept of justice.

The negative claim stands the best chance of being false: it would not be eccentric to suppose that desert or rights can make it just that some are better off than others. However, while Persson does not believe that inequalities are always unjust—in his view, some are neither just nor unjust—he argues that considerations about responsibility and ownership cast doubt on the notion that desert and rights can render inequalities just.

Like Persson, Thomas Christiano (Chapter 2) offers an argument for equality which appeals to a formal principle of justice, in this case the principle that one must treat relevantly similar cases alike and dissimilar cases unlike. He combines this principle with three further claims: that all human beings have equal moral status, that no differences between human beings entail that one person ought to receive more well-being than another, and that well-being has fundamental value of a sort that implies that moral agents have reason to promote the well-being of others (as well as their own).

Christiano suggests that the claim about equal moral status follows from the fact that all human beings have essentially the same capacity to appreciate intrinsic value. He defends his second claim very differently from the way in which Persson defends his negative claim. He simply stipulates that his argument addresses people before the onset of adulthood where, presumably, according to Christiano, but not Persson, relevant differences may derive from considerations about responsibility and desert. Finally, in support of his third claim, Christiano contends that the well-being of any particular person is an intrinsic good that contributes to the good of the world and therefore something anyone has a reason to promote.

Having laid out and defended his four basic claims, Christiano argues that they cohere much better with egalitarian than with sufficientarian or maximising views of distributive justice. Christiano's complex argument can be put very roughly as follows: if one person is justly better off than another, then by the formal principle, there must be some difference between them that renders their cases unlike. However, by the assumption of no relevant differences, there is no such difference. Hence, inequality is incompatible with the formal principle and the assumption of no relevant differences.

## 7. Equality and Responsibility

In the past, egalitarians held inequality to be bad *per se*. However, most of today's egalitarians hesitate to say this because they recognise the moral significance of choice and responsibility. Consider representative statements of the basic egalitarian principle, such as: 'It is bad—unjust and unfair—for some to be worse off than others [through no fault or choice of their own]' (Temkin 1993: 13); and '[Egalitarianism's] purpose is to eliminate *involuntary disadvantage*, by which I (stipulatively) mean disadvantage for which the sufferer cannot be held responsible, since it does not appropriately reflect choices that he has made or would make' (Cohen 1989b: 916). For most contemporary egalitarians inequalities need not be bad. They need not be bad because the worse off may be responsible for being worse off.

The modal 'need not' is important here. For statements such as those just quoted do not in themselves tell us whether anyone is ever in fact responsible for being worse off. At this point it is useful to distinguish between three different positions: responsibility-denying egalitarianism, responsibility-affirming egalitarianism, and responsibility-agnostic egalitarianism. Let us examine these positions in turn.

*Responsibility-denying egalitarians* believe that no one is ever responsible for being worse off. Accordingly, a distribution merits no adverse judgment with respect to equality if, and only if, no one is worse off than another. Though responsibility-denying egalitarianism seems a simple and, for that reason, attractive egalitarian

position, it burdens its defenders with the rejection of common-sense beliefs about responsibility. However, as Arneson points out in his contribution to the present volume (Chapter 11), this conflict may be less radical than many have assumed. In most cases where people seem to be responsible for acting in a way that makes them worse off there may be good pragmatic reasons for having them bear the costs of their actions, even if, ultimately speaking, they are not responsible for them.

In their cause, responsibility-denying egalitarians sometimes appeal to a regression principle that says that in order to be responsible for  $p$  you have to be responsible for those facts in virtue of which you are responsible for  $p$ . Since unwinding, regressive responsibility is impossible—at least if responsibility requires choice or control—it follows that responsibility is impossible. Ingmar Persson, in his defence of extreme egalitarianism, endorses something like the regression principle. In his argument for the proposition that desert and rights never justify inequalities, for instance, he points out that somewhere down the causal chain ‘we are bound to arrive at responsibility-giving facts for which we are not responsible; the regress of responsibility cannot be infinite’. While this point is surely correct, it is hard to see why it matters unless we endorse something like the regression principle with regard to responsibility.

Often responsibility and desert are conflated—that is, sometimes when egalitarians argue that inequality is not bad if the worse off are responsible for being worse off, what they really mean is that inequality is not bad if the worse off deserve to be worse off or as badly off as they are. Yet these concepts differ. Suppose, for instance, that some thoroughly virtuous person (in the prudential as well as moral sense) runs a small risk and suffers a rare and very bad outcome. Suppose by contrast that a thoroughly non-virtuous person runs the same risk and enjoys a rare and very good outcome. In this case, we might well say that while the virtuous person is responsible for ending up worse off, he does not deserve to be worse off.

The discussion of desert and equality is in many ways similar to the discussion about the relationship of responsibility and equality. Thus the threefold distinction we made above with regard to responsibility is mirrored by a trio of (denying, affirming, and agnostic) positions on desert; and many desert-denying egalitarians would appeal to something like the regression principle—although, of course, here the claim will be that to deserve something you have to deserve the basis of your desert.

Famously, Rawls’s (1971: 103–4) reason for rejecting desert seems to appeal to such a principle:

Perhaps some will think that the person with greater natural endowment deserves those assets and the superior character that make their development possible. Because he is more worthy in this sense, he deserves the greater advantages that he could achieve with them. This view, however, is surely incorrect. . . . [No] one deserves his place in the distribution of native endowments, any more than one deserves one’s initial starting place in society. . . . [His]

character depends in large part on fortunate family and social circumstances for which he can claim no credit.

On one interpretation, Rawls denies that individuals with ‘superior character’ deserve their greater rewards because such individuals do not deserve the cause of their superior character, i.e. their good native endowments and their fortunate ‘initial starting point in society’. On this interpretation, Rawls endorses a desert-denying position on the basis of a regression principle (but for a criticism of Rawls’s position so construed, see Zaitchick 1977: 370–88).

The second kind of egalitarianism we listed above is *responsibility-affirming egalitarianism*. Responsibility-affirming egalitarians believe that to *some* extent *some* people are responsible for being worse off. A *locus classicus* here is Dworkin’s discussion of expensive tastes, to which we referred in Section 2. Recall Louis, who has deliberately cultivated an expensive taste for plovers’ eggs and pre-phylloxera claret. As we have seen, Dworkin and other egalitarians—notably Arneson and Cohen (neither of whom qualify as responsibility-affirming egalitarians in our sense)—disagree about the wider implications of this kind of case (Arneson 1989, 1990; Cohen 1989*b*; Dworkin 1981*b*). They do agree, however, that the case suggests that it need not be bad from the point of view of equality if some have less welfare than others (compare Rawls 1982: 168–9). Unlike responsibility-denying egalitarianism, responsibility-affirming egalitarianism is consistent with common-sense beliefs about responsibility and desert.

The main worry about responsibility-affirming egalitarianism, of course, is whether it is possible to capture egalitarian intuitions *and* respect common-sense beliefs about responsibility and desert. Another worry is that responsibility-affirming egalitarians have to refute the philosophical arguments against the possibility of responsibility and desert.

*Responsibility-agnostic egalitarians* take no stand on the question of whether people are ever responsible for being worse off. Arneson’s influential (1989) article on equality of opportunity for welfare can be interpreted as a responsibility-agnostic egalitarian tract.<sup>9</sup> He believes that if (and only if) hard determinism is true, equality of *opportunity* for welfare collapses into equality of welfare, extensionally speaking. Yet he does not say whether, in his view, hard determinism is true (Arneson 1989: 86; 1990: 175). Similarly, although Cohen also has non-agnostic things to say in reply to the complaint that in making choice central to distributive justice he subordinates political philosophy to metaphysical questions that may be impossible to answer, he does make the following concession: ‘we may indeed be up to our necks in the free will problem, but that is just tough luck’ (1989*b*: 934). By this he presumably means to imply that we have no

<sup>9</sup> For a critique of Arneson’s equality of opportunity for welfare, see Lippert-Rasmussen (1999). For a reply, see Arneson (1999).

solution to the free will problem and therefore no justified account of the exact policy implications of egalitarianism.<sup>10</sup>

In his contribution to this volume, Arneson is sympathetic to the idea that equality (or priority) will have to be balanced with desert, although he explicitly allows that in the final analysis there may be no defensible theory of desert (say, because of the truth of hard determinism). He then sets himself the task of articulating the most plausible synthesis of equality and the idea that rewarding desert is in itself valuable. He suggests a principle that is compatible with a control principle, according to which people can be said to deserve only that which they are in a position to control. He then fashions a norm of desert as conscientiousness that is compatible with this principle.

Unlike its denying and affirming counterparts, responsibility-agnostic egalitarianism does not impose a heavy burden on its defenders to provide an account of responsibility. Its main drawback (which may not be a theoretical problem) is that, without some such view, egalitarians must remain agnostic, or undecided, about the exact policy implications of egalitarianism.

Egalitarians who concede that people can be responsible for being worse off may commit themselves to the view that people who end up very badly off through their own fault have no justice-based claim to others' assistance. Thus Marc Fleurbaey (who is otherwise quite sympathetic to egalitarianism) imagines a case where a person, knowing the risks and for no good reason, rides a motorcycle without a helmet. Suppose this person has an accident and is in urgent need of medical assistance as a result of his decision not to wear the helmet. On some egalitarian views, it would be unjust to impose the cost of medical assistance on others (Rakowski 1991). This, Fleurbaey thinks, is implausibly harsh; and this shows that justice has a sufficientarian element according to which everyone should be guaranteed a certain minimum (1995: 40–1). Responding to Fleurbaey's case, Peter Vallentyne defends the view that there is nothing unjust about a system that publicly, and in advance, declares that bad outcome option luck—such as that had by Fleurbaey's unfortunate motorcyclist—will be compensated by means of taxing away good outcome option luck. This, Vallentyne thinks, softens this objection to his favoured left-libertarian theory (2002).<sup>11</sup>

In his contribution to the present volume (Chapter 10), Andrew Williams further considers the issue of how to bring together values such as liberty, responsibility, and equality in a unified account of distributive justice. More precisely, he considers Scanlon's contractualist account of the value of choice and, in particular, its implications

<sup>10</sup> We say 'exact' because there are non-free-will-related conditions for responsibility, e.g. knowledge of alternatives, which may not be satisfied independently of whether we have free will. Indeed, one may think that owing to non-free-will-related conditions for responsibility only little inequality will fail to be in itself bad, even if we can be responsible for being worse off.

<sup>11</sup> For a related discussion of the distinction between brute luck and option luck, see Lippert-Rasmussen (2001).



for egalitarianism. According to Scanlon, roughly, there are ‘instrumental’, ‘representative’, and ‘symbolic’ reasons for wanting to have certain powers and opportunities in our lives. That is, such powers and opportunities are likely to make our choices more satisfactory (instrumental value), reflective of our own tastes and affections (representative value), and to signal competence and independence (symbolic value). However, Williams argues that this account needs to be further developed in order to give us a plausible account of permissible restrictions on liberty and of when we may permissibly refuse to compensate individuals for the harmful consequences of their choices. Amongst other things, such an account would need to appeal to the perspectives of agents other than the decision-maker when deciding how liabilities are to be assigned.

## 8. The Value of Equality

A further question is what sort of value equality is. Various issues arise here. In the egalitarian literature it is sometimes claimed that equality is good. It is also sometimes claimed that inequality is bad. And in some places, both claims are made (in fact, both formulations occur in this introduction). This may simply be due to the belief that it does not matter whether one takes equality to be good or inequality to be bad. Alternatively, it may reflect the thought that if equality has positive intrinsic value, then inequality must be bad because it excludes this positive value. Likewise, if inequality has intrinsic negative value, then equality must be good because it excludes this negative value.

Nevertheless, there is a real issue here. Consider an outcome in which everyone has a life with zero value. If equality has positive intrinsic value, this outcome contains such value. Hence, presumably, we have reason to bring it about, everything else being equal (Persson 2001: 31). If, on the other hand, inequality has negative intrinsic value, the outcome has no positive intrinsic value whatsoever. In that respect, we have no reason to bring it about.

We can also distinguish between impersonal and person-affecting versions of egalitarianism. According to impersonal versions states of affairs or other impersonal entities are the bearers of the value of equality (or disvalue of inequality). According to person-affecting versions, on the other hand, the disvalue of inequality resides in the individuals for whom it is bad (the worse off). The latter view entails that it negatively affects a person’s welfare to be worse off than others (and does so irrespective of this person’s feelings, preferences, etc.).<sup>12</sup> To appreciate the difference between these

<sup>12</sup> Larry Temkin (1993, ch. 9) defends an impersonal version and John Broome (1991, ch. 9) defends a person-affecting version.

versions, consider two populations inhabiting different continents, each unaware of the existence of the other. One day an earthquake reduces the level of welfare enjoyed by one population (the better off) to that of the other (the worse off). Of course, none of the intrinsic properties of the members of the worse-off population are affected. Nonetheless, according to the person-affecting version of egalitarianism, they become better off. At least, this will be so if inequalities between unrelated populations fall within the scope of our egalitarian concern (as we saw in Section 3, and will see again shortly, it is possible to hold that equality has a narrower scope than that).

A further distinction to note is that between what Derek Parfit (1991) has called *telic* and *deontic* egalitarianism. Telic egalitarians think inequality is in itself (or intrinsically) bad. Deontic egalitarians do not. Rather, their objection concerns the way in which many inequalities result from unequal and, thus, unjust treatment of people. Parfit suggests that these forms of egalitarianism can be distinguished in respect of both their scope and their vulnerability to the levelling down objection.

The telic view appears to have the broader scope. For, unlike telic egalitarians, deontic ones would seem to have no objection to natural inequalities or to inequalities between people living in different communities that do not interact with one another. While some egalitarians take this to favour telic over deontic views, others will point out that telic egalitarianism is vulnerable to the levelling down objection. According to this objection, which we briefly mentioned in Section 6, telic egalitarianism implausibly implies that it is in one respect better to increase equality, even if it means lowering the welfare of some and increasing the welfare of none (Parfit 1991: 17).

Consider outcomes F and G in Figure 1.3. Since telic egalitarians claim that inequality is *in itself* bad, it would seem that for them G is *in one respect* better than F. Unlike F, G is perfectly equal. Of course, telic egalitarians need not claim that G is better *all things considered*. If, as seems likely, they are pluralists, they may be in a position to claim that the higher equality in G is outweighed by the higher sum of welfare (or some other value) in F. Thus, they may endorse an all things considered ordering that satisfies the Pareto principle, i.e. the principle that two outcomes are equally

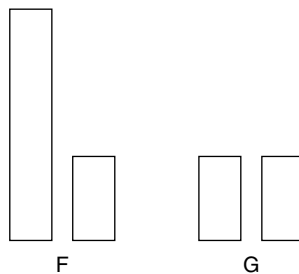


FIG. 1.3

good if they are equally good for everyone, and one outcome is better if it is better for some and worse for none. Nevertheless, telic egalitarians will still claim that G is *in one respect* better than F. But how can G be *in any respect* better, when there is no respect in which it is better for anyone? Deontic egalitarians need not be embarrassed by this query. They would deny that levelling down makes the outcome better in even one respect—in respect of equality—because they do not think that inequality is in itself bad.

In his contribution to this volume (Chapter 4), Kasper Lippert-Rasmussen unpacks the distinction between telic and deontic egalitarianism into three logically independent distinctions. He then argues that these are largely neutral with respect to scope and that while some, but not all, forms of telic egalitarianism are vulnerable to the levelling down objection, comparable forms of deontic egalitarianism are vulnerable to an analogous objection. In particular, he notices that the principle that ‘If an act or omission is *pro tanto* unjust or *pro tanto* wrong, then there is someone for whom it would have been better in some respect had this act or omission not taken place’ seems to have no less force than a comparable principle concerning the badness of outcomes that underpins the levelling down objection when directed against telic egalitarian views. Accordingly, Lippert-Rasmussen argues that it is impossible to choose between telic and deontic egalitarianism on the basis of the levelling down objection or on the basis of considerations about scope.

A strategy sometimes used by egalitarians to avoid the levelling down objection is to claim that while equality has intrinsic value (or inequality intrinsic disvalue), it has this value only conditionally. More specifically, one outcome cannot be intrinsically better than another regarding equality unless it is better for some (Mason 2001: 248). On this assumption, the egalitarian can deny the claim that levelling down is in one respect better. Thus, the increase in equality when we move from F to G in Figure 1.3 does not benefit anyone and so does not render G better than F in respect of this value.

Some sort of explanation of *why* equality is valuable only when accompanied by benefits looks necessary, however. Suppose that someone were to claim that equality is intrinsically valuable, but only if it occurs on a Tuesday. We would surely want to know why. Why not on Wednesdays? Likewise, the proposed relation between personal benefits and the value of equality requires explanation (Holtug forthcoming). This is not to suggest that it is somehow *prima facie* implausible to hold that equality interacts with other values. As we have seen, some responsibility-affirming egalitarians argue that the disvalue of inequality is conditional on the worse off not being responsible for so being. And indeed, they are able to offer an explanation of why this is so.

Alternatively, it may be suggested that one can avoid the levelling down objection by embracing person-affecting egalitarianism. Consider F and G once again. According to person-affecting egalitarianism, the worse off in F benefit if we go from F to G because they are then no longer worse off than the better off. But the fact that they benefit

from such a move is not represented in Figure 1.3. More generally, levelling down necessarily benefits some people. But unfortunately person-affecting egalitarianism is no less vulnerable to the levelling down objection than impersonal egalitarianism. Even if the worse off benefit when the better off are reduced to their level, this increase can be counterbalanced by a decrease in the part of their welfare that is unaffected by the welfare of the better off. And if this is so, what we have is a case of levelling down.

A third strategy for avoiding the levelling down objection is proposed in Christiano's contribution to this volume. Christiano argues that egalitarians are not committed to the claim that levelling down is in some respect better. While they need not claim that G is better than F with respect to equality, what they *must* claim is that there is an equal distribution of, say, the sum of welfare in F that is better than that in F in egalitarian terms. More generally, Christiano suggests that egalitarians are committed to the claim that relative to some (Pareto non-comparable) equal outcome (which is to be specified further), an unequal outcome is missing something or is unjust.

Some egalitarians have simply bitten the bullet and accepted that levelling down is in one respect good. Larry Temkin, for instance, sums up his response to the levelling down objection as follows: 'I, for one, believe that inequality is bad. But do I really believe that there is some respect in which a world where only some are blind is worse than one where all are? Yes. Does this mean I think it would be better if we blinded everybody? No. Equality is not all that matters' (1993: 282).

However, Temkin does not simply leave it at that. He challenges the levelling down objection at its very roots. Thus he argues that this objection presupposes a principle he calls 'the Slogan', according to which 'one situation *cannot* be worse (or better) than another *in any respect* if there is *no one* for whom it *is* worse (or better) *in any respect*' (1993: 256). He then argues that the Slogan has implications many will find it difficult to accept. First, it rules out the notion that certain ideals, including autonomy and liberty, contribute to the intrinsic value of outcomes. After all, increases in, say, liberty need not be accompanied by increases in welfare.

Second, the Slogan blocks the intuitively right answer to the so-called 'non-identity problem'. Suppose a woman has toxins in her body. If she gets pregnant now, the child she will have will have a severe disability that will make its life barely worth living. If she waits three months (at which point the toxins will have left her body), she will have a perfectly healthy and much happier child. One's immediate reaction is that it is worse if she gets pregnant now. However, since there is no one *for whom* it is worse, the Slogan rules this reaction out. Perhaps, then, the Slogan should be rejected. If Temkin is right, that would deal a blow to the levelling down objection.

However, in his chapter printed here (Chapter 5), Nils Holtug argues that the levelling down objection does not presuppose the Slogan. It is equally supported by a different person-affecting principle, where a 'person-affecting principle' is a principle that assesses outcomes solely in terms of how they affect individuals for better or

worse. Consider again the non-identity problem described above. A woman either has a less happy child sooner or has a happier child later. The principle Holtug proposes enables us to claim that the first outcome is worse because the second outcome is better for the happier child who populates this second outcome. Furthermore, this principle implies that, since no one is affected for the better if we level down, and since no one is affected for the worse if we do not, levelling down cannot be in any respect better. Thus, it supports the levelling down objection.<sup>13</sup>

In the present volume, Hurley, too, offers a distinctive account of the motivation for the levelling down objection. She suggests that what motivates this objection is not a person-affecting principle, but an impersonal perfectionist concern. Suppose we cannot make the sick healthy but we can make the healthy sick. Would there be anything good about doing so? Hurley thinks not. How can equality be better if it wastes excellence? On this approach, the levelling down objection is not just free of reliance on the Slogan or some other person-affecting principle; it is incompatible with any such principle. For increases in perfection need not be accompanied by increases in welfare. So, according to Hurley, perfectionism threatens person-affecting principles.

Finally, perfectionism accommodates something Hurley claims to be missing in both equality of welfare and equality of resources: the fact that health is *special*. Health is not just one good among others to be distributed. It is a distinctive kind of flourishing and good both for people *and* in itself. This means that, when we are assessing the value of distributions, it cannot be traded off against other goods—at least, not on the terms on which other goods are traded.

## 9. Equality, Priority, and Sufficiency

A great deal of attention has been paid in recent years to the distinction, made by Parfit, between *egalitarianism* and *prioritarianism*. According to prioritarians, benefiting people matters more the worse off these people are. Of course, giving priority to the worse off will often increase equality, but these are distinct values. Parfit writes:

The chief difference can be introduced like this. I have said that, on the Priority View, we do not believe in equality. We do not think it in itself bad, or unjust, that some people are worse off than others. This claim can easily be misunderstood. We do of course think it bad that some people are worse off. But what is bad is not that these people are worse off than *others*. It is rather that they are worse off than *they* might have been. (1991: 22)

<sup>13</sup> Holtug (2003) also puts forward this objection to Temkin and Temkin (2003b) responds.

In other words, there is an important sense in which equality is a *relational* value and priority is not. In order to assess the moral value of a benefit to a person in egalitarian terms, we will need to know how well off this person is relative to others. For instance, a further unit to a person who is at level  $n$  increases equality if everyone else is at  $n+1$  but decreases equality if everyone else is at  $n$ . In order to assess the moral value of such an increase in prioritarian terms, on the other hand, we need only know how well off *this* person is.<sup>14</sup>

Nevertheless, prioritarianism is sometimes referred to as a version of egalitarianism, and some political theorists have even claimed that there really is no distinction to be made (Fleurbaey forthcoming). However that may be, prioritarianism and egalitarianism share an important feature in that both entail that the best possible distribution of a fixed sum of goods is a perfectly equal one. It is therefore no surprise that a number of the contributions to this volume are as concerned with priority as they are with equality (some even more concerned with priority). The affinity of egalitarianism and prioritarianism is also borne out by the practice of some egalitarians of referring to prioritarians as ‘decent inequality’!

What sort of priority should the worse off have? There is no consensus on whether leximin should be considered a prioritarian principle, but it does contain a clear conception of what it means to give priority to the worse off. Nevertheless, leximin is rather special in that it rules out trade-offs between the very worst off and others. Another principle, sometimes referred to as ‘weighted prioritarianism’, involves setting the weights so that benefits to the worse off have greater value than benefits to the better off, but where benefits at higher levels can outweigh benefits at lower levels if only they are sufficiently great or plentiful. Another issue is how to aggregate weighted benefits over persons. Usually, a summative function is assumed, but other functions could be introduced.

Prioritarianism has been thought, by several political philosophers, to be superior to egalitarianism because it is not vulnerable to the levelling down objection. Since levelling down does not benefit anyone, not even the worse off, prioritarians see no value in levelling down.

In his contribution to this volume, Holtug elaborates this defence of prioritarianism. He examines the allegations (a) that there is really no distinction to be made between egalitarianism and prioritarianism; (b) that even if there is a distinction to be made, this distinction does not separate them vis-à-vis the levelling down objection; and (c) that, in any case, this objection presupposes a rather dubious person-affecting principle. He also assesses the claim that prioritarianism fails to capture some common and

<sup>14</sup> Arneson (2000), Holtug (1999), Hooker (2000: 55–65), McKerlie (1994), Nagel (1991: 63–74), Parfit (1991), Raz (1986: 217–44), and Scheffler (1982: 31) include discussions that are sympathetic to prioritarianism.

important intuitions about relational justice, and fails to capture the virtue, on which it is based, of compassion.

Furthermore, as we have already pointed out, McKerlie argues in his chapter that prioritariness can provide a better overall account than egalitarianism of why it matters how benefits are distributed not only over lives but also over temporal stages. And in his contribution, Arneson simply assumes that prioritarianism is the more adequate distributive principle and then proceeds to ask how it can be combined with a theory of desert.

*Sufficientarianism* is another alternative to egalitarianism. Sufficientarians agree with prioritariness that the worse off should have priority. However, they argue that there is a level of resources or welfare at which such priority ceases. This is because, at this level, people have *enough*. Along such lines, Roger Crisp defends what he calls the ‘sufficiency principle’, according to which ‘compassion for any being B is appropriate up to the point at which B has a level of welfare such that B can live a life which is sufficiently good’ (2003a: 762; see also Frankfurt 1987; Rosenberg 1995). Sufficientarians often defend their view by arguing that, intuitively, we do not care about inequalities above a certain threshold. Thus, inequalities between the rich and the super-rich do not concern us. We have no compassion for the rich even if they have to make do with \$200 wines while the super-rich gulp down wines costing \$1,000 by the barrel.

Here Fleurbaey’s point about securing a decent minimum for everyone is worth recalling. Many egalitarians will instinctively sympathize with the idea that people should be given such minima even if their need is the result of their own choices. This does not sit well with the luck-egalitarian idea that people should be held responsible for their choices. Sufficientarianism represents one way of capturing the need for a decent minimum. However, it has been argued that the sufficientarian lack of concern for inequalities above the threshold is not as plausible as it may initially sound.<sup>15</sup> In this volume, Christiano and Holtug voice their own reservations about sufficientarianism.

## 10. Critiques of Egalitarianism

Unsurprisingly, egalitarianism has not been met with unanimous approval. Setting aside the various utilitarian, prioritarian, and sufficientarian criticisms we have presented above, we shall end this survey of egalitarianism by sketching three sorts of attack on egalitarianism. These emanate from communitarianism, feminism, and libertarianism.

<sup>15</sup> Temkin (2003a). See also Crisp’s (2003b) response to Temkin.

As we saw in Section 2, egalitarians tend to assume that there is some overall good, or benefit, in respect of which people should be equally well off, although they differ on whether this good is welfare, or resources, or some other item. Distinguishing these candidate goods, we can see that egalitarians can acknowledge that there are, so to speak, subordinate distributive spheres, such as political influence and citizenship, in which equality can be assessed independently of the equality or inequality attaching to the main, superordinate currency. Thus some egalitarians, including Dworkin, explicitly set aside the issue of political equality for separate treatment.

According to communitarians such as Michael Walzer, however, this acknowledgment of separate distributive spheres does not go far enough. He thinks 'equality of what?' is a misleading question. In what is widely seen as a communitarian criticism of standard, end-result principles of distributive justice, Walzer (1983) claims that there are many distributive spheres, and that this plurality reflects our communal understanding of the differences between goods. In the United States, for instance, it is part of the cultural meaning of medical care that it should be distributed according to need, of higher education that it should be distributed by talent, of political office that it should be distributed according to votes, and of honours that they should be distributed according to desert.

In his contribution to this volume (Chapter 12) Jonathan Wolff explores an interesting application of Walzer's theory.<sup>16</sup> He suggests that the social meaning of safety is such that 'it should be provided equally for all, independently of personal wealth'. This explains why we would be outraged if rail companies were to sell first-class tickets offering better levels of safety than did second-class tickets, even though we do not object to first-class passengers enjoying more comfortable seating, free coffee, and so on. The lesson Walzer draws from such examples is that justice obtains when all goods are distributed according to criteria given by their cultural meanings. Justice is eroded when this is not the case—for example, when power is a means of achieving political office, money is a means of obtaining love, more safety, and better medical treatment, and honours are a means of getting rich.

While Walzer sees his own theory as an egalitarian theory of justice, others have objected to its inegalitarian implications. Richard Arneson (1995), for instance, observes that the fact that criteria of distribution that are allegedly internal to all goods are met would not prevent an elite from deserving all honours, getting all votes, not being in need of medical attention at all, and having talents for higher education. This outcome would hardly qualify as a just society.

Others have argued that Walzer's appeal to shared cultural understandings is either futile, since no such understandings exist, or self-undermining, since insofar as they do exist, one of the strongest such understandings we share is that distributions are

<sup>16</sup> Hurley's thought that health is a special good might be construed along similar lines.



not just simply because we think they are—that is, because the distribution conforms to our shared cultural understanding (Dworkin 1985: 214–20; Barry 1995: 75). A final point worth noting is that Walzer’s claim about different spheres of justice can to a large extent be accommodated by egalitarians who believe that there is some overall currency in terms of which people should be equally well off. They may simply couple this requirement with the requirement of distribution according to criteria internal to different goods. On this view, a just society satisfies both requirements. A society that fails to satisfy either is unjust.

Communitarians are often criticised by feminists for their blindness to the way in which culture, traditions, and local communities involve various forms of oppression and discrimination. Recently, feminist political philosophers such as Elizabeth Anderson and Iris Marion Young have levelled a related criticism against mainstream egalitarianism, rhetorically suggesting that ‘if much recent academic work defending equality had been secretly penned by conservatives’ the results would not have been ‘any more embarrassing’ (Anderson 1999: 87). Mainstream egalitarianism, according to these philosophers, tends to have an obsessive focus on compensating people for bad brute luck. It tends to ignore important inequalities in social relations, such as dominance and oppression (Young 1990: 15–65; Anderson 1999).

According to their feminist critics, egalitarians should focus on the prevention of exploitation and marginalisation. These render people powerless and subject them to cultural imperialism and sometimes violence. In particular, egalitarians should ensure that people can take full part in public life, including democratic decision-making, on an equal standing. This requires people to be adequately fed, housed, and educated. However, it does not require each and every inequality reflecting differential luck to be neutralised; nor does it mean that people should be made to bear the costs of their choices.

Indeed, luck-egalitarianism will often be in conflict with respect for people as equals. Such egalitarianism may involve condescending pity for people who are labelled ‘badly off through lack of talents through no fault of their own’ (a similar point is made by Jonathan Wolff 1998). And it may involve harsh disregard for people such as Fleurbaey’s motorcyclist, mentioned in Section 7, who through a fault of their own are no longer able to participate in public life as equals in the absence of public provision of additional resources.

In the present volume (Chapter 8), Linda Barclay considers Anderson’s feminist critique of luck-egalitarianism. She argues that while luck-egalitarians have indeed been insufficiently concerned about social relations, it is not obvious that this reflects a deep problem in their theories. It may be that, while the theories do indeed have important implications vis-à-vis social relations, the luck-egalitarians just do not pay enough attention to them.

Barclay points out that Anderson herself seems to explain the disvalue of unequal social relations in terms of their impact on people's capacities and thus well-being. This suggests, according to Barclay, that social relations are instrumentally valuable only because, and to the extent that, they have an effect on people's capacities. Barclay suggests that we can characterise an oppressive relation as 'one which jeopardises certain important capabilities, that is, opportunities or freedom to do and be certain valuable things'. If social relations only have this derivative sort of importance, they should not be the currency of egalitarian justice.<sup>17</sup>

Robert Nozick, in his now classic libertarian critique of egalitarianism, agreed in effect with feminists that some theories of justice are excessively preoccupied with compensation for bad brute luck. But in Nozick's eyes, this mistake is an expression of the more general misunderstanding that justice involves bringing about certain end-results (e.g. equal distribution or maximisation of the sum of welfare) or certain distributive patterns (e.g. distribution in which rewards fit desert).

Against such views, Nozick put the celebrated Wilt Chamberlain argument. Let us assume, for the sake of argument, that equality of money is the favoured end-result, and that money is distributed accordingly on the first day of the year. On 2 January, Wilt Chamberlain (a basketball player who was famous in the 1960s) offers to play for a certain basketball team for the rest of the year on the condition that anyone who attends this team's games puts 25 cents in a special box with his name on it. Since many people want to see Wilt Chamberlain play, he is rich by the end of the year and equality of money no longer obtains. *Ex hypothesi*, this is unjust. Yet how could the unequal distribution by the end of the year be unjust, Nozick asks? The distribution on 1 January was just, we assumed, and the unequal distribution on 31 December developed from the initial distribution through voluntary 'capitalist acts between consenting adults' (Nozick 1974: 163).

Egalitarians can try to resist Nozick's challenge in two ways. First, they can deny that voluntary agreements made in a just setting necessarily preserve justice. They might do this on the ground that people do not have absolute property rights over their possessions in the initial situation. Specifically, they might say that people do not have the right to give their possessions away or to exchange them for other goods in a way that erodes equal distribution—or, at least, that they do not have the right to do this if the state does not act to restore equality through redistributive taxation. There might well be objections to this move, but simply to assume, as Nozick does, that property rights are absolute is to beg the question against egalitarians who make it (Quest 1977; O'Neill 1981; Ryan 1981).

<sup>17</sup> For a similar reply to Anderson, see Arneson (2000). For a discussion of the moral relevance of the distinction between social and natural inequalities, see Lippert-Rasmussen (2004).

Second, egalitarians can argue that we should select an initial distribution other than equality of money. Given this different initial distribution, either inequality in the relevant dimension will not arise, or insofar as it does, this will not be unjust. One response along these lines is to favour initial equality of opportunity for resources instead of equality of money. Obviously, this condition is implicitly assumed not to obtain in Nozick's example, because Wilt Chamberlain has superior basketball skills. However, if we were to assume an initial equality of opportunity for resources and take everyone to have Wilt's talents, then either Wilt would not end up with more resources than others on 31 December, or he would, but that would not be unjust according to initial equality of opportunity for resources because others could have done exactly what he did. The latter possibility reflects the fact that initial equality of opportunity for resources (or welfare, for that matter) is not an end-result principle in Nozick's sense: whether a certain distribution of resource is just on this view depends on 'how it came about' (1974: 153).

Setting aside Nozick's critique of competing theories of justice, let us look briefly at the essentials of his own libertarian theory. According to Nozick, we own our own bodies and minds. One way to support this assumption of moral self-ownership is to imagine what might be just if we reject it. Suppose, for instance, that half of us have no eyes while the other half have two eyes. Suppose, moreover, that eyes can, without cost, difficulty, or suffering, be moved from one person to another. Without moral self-ownership, there would seem to be no injustice involved in the non-voluntary removal and transplantation (to the eyeless) of single eyes from those who have two. Many recoil at this implication.

Moral self-ownership tells us nothing about how we acquire property rights over things that are external to our bodies and minds. Here Nozick offers two 'historical' principles of justice.<sup>18</sup> All external resources were once unowned. In that situation, a person could acquire private ownership of a certain external resource in so far as his or her appropriation of it did not worsen the situation of others. This condition, the so-called 'Lockean proviso', can be interpreted in various ways. Nozick assumes that it is rather easily satisfied, since everyone benefits from the creation of incentives that result from permission to appropriate (1974: 181).

To this principle of just initial appropriation, Nozick adds a principle of just transfer (to which it seems his Wilt Chamberlain argument implicitly appeals). On this principle, if a rightful owner of something voluntarily transfers the object to

<sup>18</sup> In fact, he offers three. For simplicity, however, we leave out the third principle, which deals with how to make up for violations of the first two, and thus more basic, principles of justice. Moreover, Nozick's presentation of his three favoured principles of justice is explorative in nature and offers no clear statement of them. Here we disregard various complications and assume one plausible and common interpretation of Nozick's entitlement theory.

another for any reason whatsoever—for instance, to obtain some other good, to benefit the other person in an unselfish way, to promote a worthy cause, or to reduce inequality—the other person is the rightful owner of the object.

Nozick believes that the principle of just transfer applies to bodies and minds too. Being the rightful owner of my own body and mind, I am entitled to transfer my right to them—or perhaps better, to their use—to someone else. Obviously, there is little reason to think that many people would turn themselves into slaves. However, if all but one does so, the extremely unequal outcome that results will be just, provided self-ownership and the principles of just initial appropriation and just transfer have not been violated. On Nozick's view, *any* outcome will be just, provided it is brought about in a way that does not violate either historical principle.

There are two main egalitarian responses to Nozick's libertarianism. One is to reject the idea of self-ownership; the other is to accept the idea of self-ownership, but deny its inegalitarian implications. The latter has recently attracted a number of able defenders.<sup>19</sup> While the present survey cannot do justice to the richness of the growing body of left-libertarian literature, we shall briefly indicate a way in which self-ownership can be reconciled with distributive implications that are more congenial to egalitarians than Nozick's. Nozick assumes that the world, excluding people's minds and bodies, was initially unowned and could be privately appropriated as long as this worsened no one's position—that is, as long as the Lockean proviso was satisfied. But the Lockean proviso needs to be fleshed out. Thus, in determining whether someone's situation is worsened by private appropriation, it makes a huge difference whether we are comparing this situation with one in which the appropriated object continued to be unowned or with one in which the affected person instead appropriated the object himself.

Nozick nowhere provides a thorough defence of the assumption that the world was initially unowned; nor does he properly explain the Lockean proviso. And by disputing either of these assumptions—that is, by in effect rejecting Nozick's principle of just initial appropriation—it is possible to defend egalitarian redistributive schemes, especially in view of the fact that any effective use of one's body requires external resources such as air or the physical space one's body occupies (Cohen 1986a, b, 1989a).

Of course, not all egalitarians have become left libertarians. Some simply reject self-ownership. Persson, in this volume, argues that the idea that one owns one's body because one was the first to occupy it or make use of it must be rejected. According to Persson, 'it is just that everyone gets equally good bodies (i.e. bodies that enable them to be equally well off) unless there is something to make it just that some get better bodies than others'. Thus it will be just that some have better bodies than others only if those who do are responsible for getting better bodies and those who do not are

<sup>19</sup> Van Parijs (1991, 1995); Otsuka (1998, 2003); Steiner (1994, 1998); Steiner and Vallentyne (2000).

responsible for getting worse bodies. But surely no one is responsible for either. It is hard to see how it could be possible for someone to be responsible for ‘getting’ a good or a bad body.

Christiano also rejects self-ownership, but for rather different reasons. His main argument is that such ownership is inconsistent with our honouring of the value of humanity. As we have seen, Nozick’s theory allows one to sell oneself justly into slavery for no particular reason. It also allows one to kill oneself for no particular reason. But Christiano argues that one has a duty ‘to value and respect one’s own humanity’, and that this ‘implies that one is not permitted to destroy it or damage it or waste it or even sell it in perpetuity (unless on the basis of very weighty considerations)’. These restrictions on what one may do to oneself, deriving from a Kantian duty to promote and honour the humanity in oneself, are incompatible with Nozickean self-ownership. Accordingly, so Christiano thinks, we must reject the latter, thus paving the way for a more substantial egalitarianism.

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