

**Cooperative Systems:
Characterizing the Requirements of Relational Egalitarian Justice**

By

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CHAPTER 1

What is Egalitarianism?

The term “equality” has a great deal of significance in contemporary society, but it also has many meanings. In this dissertation, I am concerned with the concept of equality that is involved in egalitarian conceptions of justice within political philosophy. Egalitarianism in this sense makes the claim that all persons are of equal moral worth and, as a result, in order for a society to be considered just it must make equal something in the shared elements of their political lives. This means that in order for a theory of justice to be considered egalitarian, it must involve two core elements. The first is the assumption that that all people are morally equal at a fundamental level. The source of that basic moral equality is a matter of much debate, but the fact of it is universally held by egalitarians. The second element is an inference from the assumption of basic moral equality to the claim that justice requires rendering equal some specific aspect of peoples’ lives. Existing within a political society entails living collectively within institutions that create advantages and disadvantages, distribute benefits and burdens, structure relations and interactions, and wield coercive power. Thus, upholding basic moral equality requires making people equal with regard to something that impacts those politically relevant aspects of their lives, and justice requires upholding that basic moral equality. Determining the relevant element of peoples’ lives that must be rendered equal is a matter of further debate, but these two basic components remain constant throughout egalitarian theories.

Egalitarians are far from the only political theorists who assume that people are fundamentally morally equal. Furthermore, upholding that basic moral equality is frequently emphasized as a matter of particular importance in political philosophy because of the coercive nature of political power (especially state power), backed as it is by the threat of force.¹ Many political theorists take being subject to coercive power to be a prima facie violation of basic moral equality, due to the way in which it undermines a person's freedom and ability to choose for themselves what to do. This leads most theorists, including anti-egalitarians, to view the legitimacy of the state and its claim to that coercive power as contingent on upholding basic moral equality in some relevant way.²

However, egalitarians take things a step further by arguing that the just state is one that not only upholds basic moral equality, but also acts on the claim that doing so requires rendering equal some other, specific, relevant element of peoples' lives. It is this second step that distinguishes egalitarians from other theorists of justice. By contrast, a libertarian (for example) would also hold that all persons are morally equal. However, a straightforward version of the libertarian theory would claim that a just society upholding this equality must entail a minimal state that only imposes the rules necessary for protecting the equal negative rights of individuals. Anything beyond that would be seen by such a libertarian theory as itself a violation of equality.³ The egalitarian, on the other hand, argues that upholding basic moral equality requires a positive

¹ The threat of force means that political power is always coercive, although it is not exclusively coercive. Many of the services provided by political institutions are not themselves coercive, but because they are all regulated to varying degrees by laws that are backed up by the policing and carceral systems, they do all involve a threat of force that gives them coercive power as part of their structure.

² I do not intend to restrict discussions of egalitarian justice to the context of the state. However, for the sake of clarity, this discussion of coercive political power focuses on the state.

³ It is possible that there are no libertarians who hold precisely this view, and I don't intend to argue against the libertarian position here. However, such a hypothetical position is useful in drawing the contrast with egalitarianism.

action to make equal other elements of the person's life. The question the egalitarian then has to answer is what exactly can and should a political system make equal?

In the rest of this chapter, I will survey some of the important areas of debate within the literature on egalitarianism, and the most prominent positions taken within those debates.⁴ The chapter will proceed in five parts. In the first section, I will establish the starting point of all egalitarian theories, by describing in more depth the assumption of basic moral equality and the inference that theories must draw based on that assumption in order to be considered egalitarian. I will then outline the four main questions that have been sources of disagreement within egalitarianism:

- (1) What is the point of equality?⁵
- (2) Equality of what?⁶
- (3) Where is the site of egalitarian justice?
- (4) Who is within the scope of egalitarian justice?

My discussion of the first of these questions, the one about the “point of equality”, will end Section 1.1. This is because I take the answers given to this question to create the core divide in current approaches to egalitarian justice, between *distributivism* and *relationalism*, and as such it must be answered before the other questions can be addressed. For many decades, most egalitarian theorists in mainstream political philosophy assumed that the point of equality was to render equal the distribution of some distributable good, such as income, wealth, welfare, or opportunity. In Section 1.2., I will discuss these *distributivist* views and their internal debates.

⁴ There are theorists in the history of philosophy who could be considered egalitarians in a similar sense to how I am using the term. However, my focus is on the terrain that has been developed since John Rawls' *A Theory of Justice* ([1971] 1999), since that account is the fulcrum for most of the literature at this time. I will also only touch briefly (in Section 1.5.) on contemporary discussion of equality and justice that fall outside of the broadly liberal tradition. I do not intend to understate the importance and relevance of both the historical and the non-liberal discussions of equality and justice in a political context. However, in depth discussion of these contributions is outside the scope of this project.

⁵ I take this question directly from Elizabeth Anderson's 1999 article, "What is the Point of Equality?"

⁶ I take this question directly from Amartya Sen's 1979 Tanner Lecture on Human Values.

However, more recently the dominance of the distributivist approach has been challenged by a category of approaches that instead conceptualize the point of equality as being to render equal certain kinds of relationships among people within a political system. While distributivists claim that egalitarian justice is fundamentally about making people equal in what they have, *relationalists* argue that it is people themselves that must be made equals, by standing in relations of equality with each other. These relationalist views will be the focus of the second half of this dissertation, but an initial outline of the terrain of how egalitarian theories that put forward this answer to the point of equality answer the other three questions can be found in Section 1.3. In Section 1.4. I will briefly outline several theories that mix together distributivist and relationalist elements, with neither taking priority, while the last section will gesture towards several kinds of non-liberal theories that focus on equality when discussing political institutions. These approaches to political questions hold the same two initial premises as egalitarianism, but because they are not grounded in principles of liberalism, they are taken to stand outside of most of the discussion of egalitarian theories of justice in mainstream political philosophy. I will only touch on the variety of these theories, in order to point to possible insights and fruitful discussions that are outside of the scope of this dissertation, but which I intend to take up in future projects.

1.1. Basic Moral Equality and its Political Implications

Few people today would doubt the idea that all persons share something that makes them equal subjects of basic moral concern and obligation, although that idea has been unevenly applied

throughout its history (even by those who were its biggest proponents). This is not just an assumption held by egalitarians. However, despite its prevalence as an idea, there is yet to be a satisfying, unifying explanation for why that basic moral equality is the case. Jeremy Waldron (2017) presents an effective survey of some of the candidates for the justificatory feature of human beings that grounds their basic moral equality, while in the process demonstrating why basic equality is such a difficult moral concept to define. The vast differences among human beings when it comes to any possible metric make it difficult to pinpoint any particular characteristic that can be used to establish what Waldron calls *continuous equality*, a moral principle which “denies the existence of major discontinuities in the human realm” (Waldron 2017, 30). Denying such discontinuities supports the idea of basic moral equality, because without a clear divide in characteristics among humans, there is no clear place to draw the line between those who are equal and those who are not.

Unfortunately, each of the various possibilities that Waldron surveys have faced critiques that indicate some difficulty with establishing such continuous equality. The candidate characteristics include (but are not limited to) membership in the human species, sentience, the ability to reason either abstractly or morally, the ability to use language, the possession of personal autonomy, and the ability to have a relationship with God.⁷ In each case, either the characteristic is not held by some humans that intuitively should be included, the characteristic is held by some entities that intuitive should not be included, or there is a lack of a clear connection

⁷ It is even more difficult to establish what Waldron calls distinctive equality, which “says that not only are humans one another’s equals in the continuous sense, but also they are one another’s equals on a basis that does actually differentiate them from animals” (Waldron 2017, 31). However, I am only concerned with continuous equality for the purposes of this dissertation, as I intend to remain neutral on whether non-human animals could be the concern of basic moral equality and justice.

between the characteristic in question and morality. Due to these challenges, no consensus has been reached on which, if any, of these features is the justification for basic moral equality.

Waldron himself suggests that it is not a single, precise property that grounds such equality, but is instead likely a set of what he calls *range properties*, which he suggests can be used to describe several of the candidate characteristics (such as personal autonomy and moral capacities) (Waldron 2017, 126-127).⁸ Although these debates are ongoing, egalitarian theorists assume that despite the lack of a definitive answer to *why* all persons are morally equal on a basic level, such equality exists and is a fact from which they can build.

Egalitarians then infer from the fact of basic moral equality that a society being just entails it rendering something equal in people's individual lives in order to uphold that basic moral equality.⁹ Whatever is identified as being rendered equal will be intended to address the circumstances that arise in the context of people living together with shared institutions, and as a result will be relevant to the imposition of advantages and disadvantages, benefits and burdens, institutions, structures, and relationships that living in such a political society creates. In so far as the intent of an egalitarian theory is to address the circumstances arising from living together in a political society, the legitimacy of the political institutions of such a society is usually seen by egalitarians to depend at least in part on it being just in this way. The arbitrary use of coercive power, the unjustified granting of advantage or disadvantage to various persons or groups, and the imposition of hierarchies are three of the clearest examples of the ways in which people in

⁸ Waldron explains that "R is a range property with respect to S, if R applies to individual items in virtue of their being within a certain range on the scale indicated by S. In the simplest case, R is like a threshold. If you are over a specified threshold on scale S, you qualify for property R. But the range may have an upper limit as well, or it may be configured in a more complicated way in a two- or n-dimensional model" (Waldron 2017, 119).

⁹ I use this phrasing to avoid any premature commitment to an account that is about expressing, respecting, acting, taking to be, viewing as, or any other specific formulation of the requirements of egalitarian justice. Different theorists may qualify this statement with "within its borders" or "who are its citizens". However, for now I also want to remain neutral on whether egalitarian justice only applies within a state or only to the citizens of a political system.

positions of power in political systems may fail to treat people as equals. In doing so, they risk undermining the legitimacy of the system as a whole.

It may be helpful to look to an example of an egalitarian theory that has shaped the field as it stands today, in order to understand how these elements hang together. John Rawls' "Justice as Fairness" is perhaps the most influential attempt in contemporary political philosophy to articulate what a theory would look like when based the assumption of basic moral equality and the claim that upholding it requires rendering equal some additional element of peoples' lives. As such, I take Rawls to be an important starting point for understanding egalitarian theories of justice as they currently stand. His methodology, and the two principles of justice that he derived using it, have shaped the discussion of egalitarianism that has followed in ways that should be addressed.

Rawls argued that the best way to identify principles of justice involves determining what "free, equal and rational persons concerned to further their own interests would accept in an initial position of equality as defining the fundamental terms of their association" (Rawls , 10). He used the "veil of ignorance" as a methodological tool to strip the imagined participants down to such a state of equality, imagining them in the "original position" with no knowledge of their own identity, status or condition (Rawls [1971] 1999, 11). The intention here can be interpreted as effectively putting them all in a position of basic moral equality, such as is assumed by egalitarianism, before theorizing justice from that starting point. He argued that from such a position those free, equal, rational, and self-interested individuals would converge on two principles of justice, which would then be used to "regulate all further agreements", such as setting up social cooperation in general and forms of government in particular (Rawls [1971] 1999, 10).

The first of these principles is that “each person is to have equal right to the most extensive scheme of equal basic liberties compatible with a similar scheme of liberties for others” (Rawls [1971] 1999, 53). The second goes through a couple iterations, before finally stating that “social and economic inequalities are to be arranged so that they are both (a) to the greatest expected benefit of the least advantaged and (b) attached to offices and positions open to all under conditions of fair equality of opportunity” (Rawls [1971] 1999, 72). Both of these principles clearly indicate ways in which justice entails making something equal. The first renders equal the right to basic liberties. The second renders equal access to positions and offices attached to social and economic inequalities in its first iteration, and then opportunity in the second. Although what is being made equal differs in content between these principles, the inference from basic moral equality to rendering equal something that impacts politically relevant benefits and burdens is clearly present in them all, making it evident that Rawls’ theory of justice is an instance of the general conception of egalitarianism presented here. There is a great deal more to Rawls’ theory of justice than this, but since these are the aspects with the most influence on egalitarianism in particular, this limited overview provides a starting point to contextualize the developments in egalitarian theory that have followed.

It is also worth noting that Rawls’ theory predates the debate between distributivist and relationalist theories of egalitarianism, and it leaves open the question about the point of equality. However, his work has been used by both sides of the debate at various points, with each arguing he shows support for their position. Many distributivist theorists have drawn on his discussions of primary goods (Dworkin 1980, 344) and of the distinction between circumstance and choice (Kymlicka 1990, 70). Some relationalists have pointed to his emphasis on democratic society understood as “a system of fair cooperation among free and equal people” (Scheffler 2003, 25).

Despite this, an ambiguity as to which side of current debates he would fall on remains, and although much ink has been spilled on trying to definitively interpret his position, the ambiguity itself is informative. It draws attention to how, even within theories that explicitly label themselves as distributivist or relationalist, some elements of the other approach are often incorporated. Relationalist theories generally seem to require at least some mention of distribution in the course of defining what it means for citizens to stand in relations of equality, and distributivists have to some pay attention to relationships between people (if only because having more, less, or the same amount of some good is in a minimal sense a kind of relation). With this in mind, in both this chapter and Chapter 2 I will be careful to emphasize what makes a theory relational instead of distributive in the sense relevant to this debate.

Rawls is important for contemporary egalitarianism because both his proponents and critics often build their theories of egalitarian justice with reference to his work, with many starting from several different points within his theory of justice in constructing their own theories. Regardless of this continued orientation, the field of egalitarianism as a whole has also expanded a great deal beyond Rawls' original insights. In the remainder of this chapter, I will survey some of the many different paths that have been taken by the literature on egalitarian justice in the decades since.

As mentioned previously, there are four core questions that can be used to frame the debates and disagreements that shape much of that literature:

- (1) What is the point of equality?
- (2) Equality of what?
- (3) Where is the site of egalitarian justice?
- (4) Who is within the scope of egalitarian justice?

As also mentioned previously, it is the question of the point of equality which produces the debate that I intend to engage with in the remainder of this dissertation. Because of this, I will

address it first, before moving into a discussion of each of the three other questions within the two broad categories of egalitarianism that are produced by its answers.¹⁰

(1) *What is the Point of Equality?*

For many years following Rawls, the dominant stream of thought on egalitarianism in academic political philosophy was a set of views that can be grouped under the name *distributivism*. This broad category of theories take the stance that the point of equality is to render equal the distribution of some specified distributable good. There are a wide variety of distinct views within that broad description, but at its base it sees egalitarian justice as a matter of how to allocate some good that can be distributed such that some people have either less, more or equal amounts of that good. The position held by distributivists can be expressed at its most general as the following principle:

“The point of equality is to render people equal in the distribution of some relevant currency.”

There are several ways in which this principle has been understood within distributivism. Some interpret rendering the distribution of some good equal in terms of strict equality, requiring that everyone have exactly the same amount of that good regardless of who they are, how they act, or what they choose more generally. However, this version of egalitarianism is often critiqued by libertarians, who argue that the redistribution of things that would be required in order to achieve and maintain strict equality is unfair to those who work harder in order to get more of those things (Nozick 1974, 160-164). It also faces critiques among those who are sympathetic to egalitarianism, because of what is known as the *levelling down objection*. If strict equality is the goal, then there is nothing in that idea of equal distribution that necessitates reaching that

¹⁰ I have tried to put forward a neutral framing of these debates that presents all of the major positions. However, the order in which one answers these questions may influence the answers one gives to the question. The choice to ask about the point of equality first is in itself a position that influences the direction of this entire dissertation.

equality by increasing the amount held by the worst off. It could instead be fulfilled by reducing the amount held by the best off (Parfit 1991, 98; see also Raz 1986 and Temkin 1993), and often this approach to rendering strictly equal will be more efficient. This outcome is seen as both counter-intuitive and morally questionable, as it could make some people worse off than they would otherwise be with no tangible benefit to the others.

As a result of these objections, and the levelling down objection in particular, most distributivists have moved away from interpreting “equal distribution” in terms of strict equality. Some have moved away from egalitarianism altogether, instead suggesting that either an approach that focuses on a threshold of sufficiency or an approach that focuses on prioritizing certain people and situations could better capture their goals for a theory of justice. This had led to the development of sufficientarian theories such as that of Harry Frankfurt (1987) and prioritarian theories such as those of Derek Parfit and Larry Temkin (1998).¹¹

Those that keep within distributive egalitarianism offer as an alternative a set of egalitarian views which can be broadly referred to as *responsibilism*. These theories hold that justice demands people have equal holdings of some specified good, unless the person can be held responsible for their unequal holdings. This has the result that some inequality, even with respect to the relevant goods, can be consistent with egalitarian justice, so long as that inequality is the result of something for which the person is responsible. Of course, what counts as being responsible in the relevant sense is a matter of much debate. This subset of distributivist egalitarian views gained popularity as a means to successfully counter the libertarian critiques

¹¹ There are some theorists who are widely regarded as egalitarians who use a sufficientarian principle as an aspect of their theory. Elizabeth Anderson takes a sufficiency view of distribution within her relational egalitarian theory, specifically when it comes to capabilities (Anderson 1999, 318), and Kok Chor Tan argues for strict equality up to the threshold that is sufficient to fulfill basic needs, and then luck egalitarianism (a version of responsibilism) above that level of sufficiency (Tan 2008, 670). I will not address the question of whether such theories are really egalitarian here.

against strict equality discussed earlier, without giving up the second core element of egalitarianism. It allows for different treatment of those who work harder on the one hand, or those who knowingly put themselves in a position that leads to disadvantage on the other, while maintaining equal distribution as a kind of default.

There are several ways a view of egalitarianism can be responsibilist, but the most pervasive subset of such views is known as *luck egalitarianism*.¹² Kok Chor Tan describes luck egalitarianism as a category of theories which hold that equality in distribution matters for justice because “the moral equality of persons requires that each person take responsibility for her choices and assume the costs of these choices” (Tan 2008, 665), leading to the principle that “distributive justice should be fundamentally choice-sensitive but luck-insensitive” (Tan 2008, 666). Other responsibilist views may appeal to conceptions of desert or merit (see Brouwer and Mulligan 2019), rather than luck and choice, but share the core idea that unequal distributions are just so long as they are tied to something for which the individual is responsible.

Although distributivism, and particularly luck egalitarianism’s brand of responsibilism, was the dominant strain in the literature for a long time, another major shift has occurred as the result of a set of critiques from within egalitarianism. Several proponents of egalitarian theory (including Iris Marion Young, Elizabeth Anderson, Samuel Scheffler, and Jonathan Wolff) have critiqued the exclusive focus on distribution as what matters most for egalitarian justice. Some of those critics then offer egalitarian alternatives that refocus their theories of justice as a result of a new answer to the point of equality. Many of these accounts pick up a thread of argument first laid out by Elizabeth Anderson in her 1999 article, which made explicit the question “What is the

¹² It is worth noting that “luck egalitarian” is a term coined by Elizabeth Anderson, who is a critic of the luck egalitarian view. Not all theorists that Anderson and other critics of the view label as luck egalitarians would use the term to refer to their own approaches. For example, Ronald Dworkin did not consider himself a luck egalitarian despite being one of the main figures in Anderson’s critique (Dworkin 2003).

Point of Equality?” Anderson argues that the point of equality is not fundamentally about distributing benefits and burdens, but instead entails establishing relations between people that guarantee “all law abiding citizens effective access to the social conditions of their freedom at all times” (Anderson 1999, 289).¹³ Certain specific distributions will likely be necessary in order to produce those relations and social conditions, and may even be constitutive of them, but it is the relations that they produce which are most fundamental to the question of justice. More generally, Anderson’s view can be seen as part of a broader category of theories I will refer to as *relationalism*, which share a focus on justice as a matter of establishing certain kinds of relationships between people in a society. Generally, relationalist views can be described as adhering to the principle that:

“The point of equality is to create and maintain conditions that enable people in a society to stand towards one another in relations of equality”

Section 1.3. will outline some of the ways in which this relational approach to the point of equality have resulted in differing answers to the other three questions, often running parallel to similar debates in distributivism.

There are also egalitarians who argue that these two answers to the point of equality are not in conflict, and that it is some particular mix of distributivist and relationalist views that is the point of equality. A selection of these approaches is discussed in Section 1.4., although I will not present specific answers to the four questions for either the mixed views or the other egalitarian approaches from outside of the liberal literature that I will touch on in Section 1.5.

¹³ It is again important to emphasize that this does not mean relational egalitarians think distribution is unimportant and irrelevant to justice.

1.2. Distributivism

Although versions of the remaining three questions at the core of egalitarianism are applicable to both views, the iterations applicable to distributivism are very different from those that are most important for relationalists.¹⁴ This section will focus on the distributivist versions.

1.2.1. Debates in Distributivism

(2) Equality of what?

Amartya Sen's 1979 Tanner Lecture, "Equality of What?" asked the question that has spurred one of the most prolific debates in political philosophy over the last few decades. However, each of the most prominent answers to the question of what kind of thing should be distributed equally in distributive egalitarianism has faced serious critiques. Equality of welfare (as described in Dworkin 1981a, 186) runs into the problem that some people have more expensive tastes, like plovers eggs and pre-phylloxera claret, and as a result create a greater resource drain in order to reach the same level of welfare (Dworkin 1981a, 228-229). Equality of resources (Dworkin 1981b, 283) faces the problem that different people have differences in their ability to transform those resources into the same level of well being (Sen 1979, 215-216). For example, someone with a chronic illness will require more money to pay for health related expenses in order to continue living (let alone living a life they consider fulfilling) than someone without such a condition. Many of the others, such as equality of opportunity for welfare (Arneson 1989, 77), access to advantage (Cohen 1989, 916), and capabilities (Sen 1979, 218-219; Nussbaum 2003,

¹⁴ Those questions are:

- (2) Equality of what?
- (3) Where is the site of egalitarian justice?
- (4) Who is within the scope of egalitarian justice?

54) are considered by many to be too vague to be easily measured, and any attempt to effectively measure them would be too invasive. On the other hand, Martha Nussbaum's version of capabilities is sometimes critiqued as pulling too far in the other direction, and being too prescriptive, because it lists specific capabilities that must be fulfilled and is grounded in Aristotelian perfectionism (Nussbaum 2003, 54).

The variety of answers given to the question "equality of what?", and the problems that each answer poses, point to the difficulty of identifying what exactly it means to render something equal in a political context even within the confines of equalizing distribution. Answering this question was the most active area of debate within egalitarianism for many years, with each theorist presenting cases that showed the possible absurdity of using the other metrics. It was also one of the main flashpoints for Anderson's accusation that egalitarianism had lost its way. The cases used to illustrate the weaknesses of different currencies often focused on ludicrous examples and thought experiments, with little to do with what many people would think of as the main concerns of equality (Anderson 1999, 287). Despite this critique, the issue of identifying the relevant currency for justice is crucially important for not only distributivists, but also relationalist theories that view distribution as an important (though not fundamental) component of justice. A parallel question also arises in relationalism, which all such theories must address, and which I will discuss in Section 1.3.

(3) Where is the site of egalitarian justice?

The third core debate of egalitarianism asks where justice resides in a society. For distributivists, this requires locating what part of society is responsible for the distribution of the goods that must be made equal. Rawls established a precedent by identifying the site of his theory of justice

in the basic structure of society (Rawls [1971] 1999, 47), and his influence can be seen on most of the egalitarian theorists who have followed. Among those, Kok Chor Tan has been the most explicit in restricting the domain of egalitarian justice to basic institutions, naming his theory *institutional luck egalitarianism* (Tan 2008, 689). However, an institutional focus has also been implied by many of the other distributivist views stamped with Rawls' influence, who share the view that justice is a political concept and should therefore only be applied to institutions.

Even when the focus is narrowed to the basic structure, the question arises of which institutions are included. Egalitarians often remain ambiguous as to whether the site of justice is restricted to political institutions, or if it can be expanded to cover institutions usually considered part of the private sphere such as the family and the economy. Feminist critics of Rawls, such as Susan Okin and Iris Marion Young, have urged their colleagues to pay further attention to the family in particular as a site of justice (Okin 1989; Young 1990, 21), but this concern has not received as much in depth attention from the rest of the mainstream egalitarian literature as it deserves.

There is also the possibility that the site of egalitarian justice should be expanded to include any and all institutions, rather than just the basic structure (however that is defined). This broader institutional approach is suggested in Young's description of the political as concerning "all aspects of institutional organization, public action, social practices and habits, and cultural meaning in so far as they are potentially subject to collective evaluation and decision making" (Young 1990, 9). However, this version of the political is viewed by many contemporary egalitarians as too expansive, making the site of justice so broad that it no longer fits within what is commonly considered the domain of political power.

Although egalitarian theories of justice with a focus on institutions have received the most explicit theorization, there is another alternative. Transactional accounts of distribution, where the focus is on individuals rather than institutions, would be an approach that centers an alternative site of justice that egalitarians often implicitly draw on (or at the very least leave the possibility open to interpretation). The auction and insurance scheme that are central to Dworkin's account could be interpreted institutionally, but also could be interpreted as locating the site of egalitarian justice in individual transactions (Dworkin 1981b), while Sen and Nussbaum's capabilities seem to require more than just institutional actions in order to be distributed equally. Cohen even expresses this kind of transactional focus explicitly, although it is not the exclusive focus of his account (Cohen 2000). The fact that these theories show these transactional inclinations may be grounds for arguing that they are inadequate as political theories of justice. However, they also raise the question of how much the institutional aspects of justice can be theorized without attention to the individual level interactions of people within and around those institutions.

The question of the site of egalitarian justice is important because where egalitarian justice is located will determine who is responsible for it, and who or what can make demands in order to try to achieve it. The different ways a theory answers this question will also open up different possible challenges for the account. While focusing on basic structures ensures that the theory remains in the realm of the political, at the same time it severely restricts what a theory can demand of individuals because of the restrictions on what political institutions can do that is discussed in Section 1.1. As a result, the institutional site restricts what a theory of justice can accomplish. A focus on individuals and their transactional behaviors, or even just a more extensive set of institutions, opens up a more holistic view of what justice as an ideal may

demand, but it risks a paternalistic and even perfectionist interference that most people think is beyond what a political theory can legitimately call for. Although I intend to leave somewhat open the question of site, the requirements for a minimally adequate theory of egalitarian justice I discuss in Chapter 2 will implicitly narrow the possibilities.¹⁵

(4) Who is within the scope of egalitarian justice?

The final question that structures much of the egalitarian literature asks who is included within the sphere of concern of an egalitarian theory of justice. Rawls, and many of those who have followed him, saw justice as restricted to the nation state, because he thought that the principles of justice needed to be implemented by the institutions of a state government (Rawls 1999, 42). Other theorists, however, have either explicitly argued or implicitly suggested that all evidence for the necessity of egalitarian justice within the bounds of the state is also applicable outside of it, giving egalitarianism a global scope (see, for example, Tan 2011, 395; Pogge 1989, Chapter 6; Beitz 1975, 361; Sen 1999). On the other end of the spectrum, the argument could also be made that the scope of egalitarian justice should be smaller than an entire nation state, restricted instead to a regional or community level so that the principles of egalitarianism are more localized.¹⁶

The focus of debates over this question is often on what and whether geographical borders can be drawn around the “who” of egalitarian justice. However, I take the issue of scope to also include identifying who within those geographical borders is included in distributive justice. The answers a theory gives about the point, currency, and site of egalitarian justice will

¹⁵ The description I give of justice and the requirement to avoid problematic perfectionism restricts the possible site of egalitarian justice away from a comprehensively transactional approach, while at the same time presenting a more expansive institutional view than some institutionalists would use.

¹⁶ Michael Walzer can be read as taking a version of this position (see Walzer 1983).

raise further questions about whether non-citizen residents, more temporary visitors, and even illegal immigrants are counted within its scope. It also raises the question of whether those with severe intellectual disabilities are included, and whether justice applies to non-human animals. In the future, it even may expand to questions about where artificial intelligences are included as well. Each of these issues of the scope of justice within a geographical location will have important implications for the practical applications of any distributive egalitarian theory, and it is at least in part a concern with such practical implications that provoked the turn away from distributivism and towards an alternative.

1.3. Relationalism

In the previous section, I outlined in broad strokes the most prominent positions that distributive egalitarians have taken on three core questions: those of the currency, site, and scope of egalitarianism. I also mentioned earlier in this chapter that, although distributivism was the dominant strain of egalitarianism for many years, critiques from within egalitarianism have led to an increased focus on alternative accounts, specifically those known as relational egalitarianism. In this section, I will begin by discussing those critiques of distributivism from relationalists, before next describing the shared elements of relational egalitarian views as an answer to “what is the point of equality?”. I will then outline some of the various answers relationalists give to the same three core questions of egalitarianism:

- (2) Equality of what?
- (3) Where is the site of egalitarian justice?
- (4) Who is within the scope of egalitarian justice?

1.3.1. Egalitarian Critiques of Distributivism

Within egalitarianism, critiques of the distributivist camp have taken on several different approaches. Here I will discuss four of the arguments against distributivism that are usually seen as initiating the turn away from such views by many egalitarianism, coming from Iris Marion Young, Jonathan Wolff, Elizabeth Anderson, and Samuel Scheffler.

Young provided one of the earliest critiques of what she calls “the distributive paradigm” in theories of justice, in which she takes aim at the broad category of distributivist views as a whole for what it misses. Young describes this paradigm as being in force where there is “a tendency to conceive of social justice and distribution as coextensive concepts” (Young 1990, 16), and although she recognizes the importance of distributive issues for justice (Young 1990, 15), she criticizes theorists who take it as a given that justice is primarily about distribution and who assume “a single model for all analyzes of justice” (Young 1990, 18). She argues that the problem with the distributive paradigm is how it focuses on the allocation of material goods and social positions, and ignores “the social structure and institutional context” that operate in the background of these allocations (Young 1990, 15). Even when theorists operating within this paradigm do consider factors of social organization beyond material goods and social positions, they still consider these to be “something or aggregate of things that some specific agents possess in certain amounts”, which can therefore be understood in terms of distribution (Young 1990, 24). Young objects to this strategy, arguing that understanding non-material goods in terms of distribution misrepresents them because “it reifies aspects of social life that are better understood as a function of rules and relations than as things” (Young 1990, 25). This is important, because justice is not only about what people have, but also what they do (Young 1990, 25). Theories that focus on distribution alone miss important aspects of justice, specifically

elements of rights, opportunity, self-respect and power that cannot be understood adequately in terms of distribution (Young 1990, 25-33).

Jonathan Wolff presents a slightly different, although related, critique. He is often seen as one of the earliest critics of luck egalitarianism specifically, although he expresses reluctance to characterize himself that way (Wolff 2010, 346). His particular concern, originally outlined in his 1998 article, “Fairness, Respect, and the Egalitarian Ethos”, is the almost myopic focus on the value of fairness that seemed to motivate most egalitarian theories at the time. He argues that instead of just focusing on fairness, theories of justice should also be motivated by the value of respect. Even if respect is given attention in these egalitarian theories, whenever there is a conflict between the two values and a trade-off was needed, fairness always takes priority. Wolff argues that sometimes, it should be respect that is prioritized instead (Wolff 1998, 97). He also argues concerns of justice are not the only relevant issues when developing egalitarian principles. There are other necessarily egalitarian values that often get compromised in the pursuit of justice alone, and there must be some method of assessing the costs in these other relevant areas when one is implementing just principles (Wolff 1998, 101). As a result of these tradeoffs, he wants to reject the idea that “egalitarianism is constituted by a lexically prior notion of fairness” (Wolff 1998, 103), and instead put forward a pluralist notion of an egalitarian social ethos, where both fairness and respect (at least) are equally central to egalitarianism (Wolff 1998, 106).

Over a decade later, Wolff revisited the 1998 article to clarify and elaborate on some of his concerns about contemporary political philosophy’s discussion of egalitarianism. Instead of attacking the luck egalitarian notion that justice requires distribution tracking choice and not luck, Wolff is most critical of how the majority of discussions of egalitarianism are lacking a vision of the good society, show too much attention to material goods, demonstrate a lack of

attention to production in economic life, and put too narrow a focus on individual responsibility (Wolff 2010, 337-339). Many of these concerns are similar to those articulated by Young, and seems to take aim at distributivism more generally rather than luck egalitarianism in particular. However, Wolff maintains that he is not rejecting luck egalitarianism, although he is concerned with the ways these flaws are caused by the exclusive focus on fairness in the literature, and the shameful revelations and counter-intuitive conclusions that often seems to be what would result from those theories (Wolff 1998, 109). Instead, his greater objection is to a kind of ideal theory that focuses on a value of fairness alone, without attention to other egalitarian values and the challenges that they pose for acting on an egalitarian theory of justice (Wolff 2010, 346).

Elizabeth Anderson presents a much more targeted critique of luck egalitarian versions of distributive justice, and her argument is often seen as initiating the shift in thinking about egalitarianism away from distributivism in general and luck egalitarianism in particular. She states that any minimally adequate egalitarian theory must pass the test “that its principles express equal respect and concern for all citizens” (Anderson 1999, 289), and then argues that luck egalitarianism fails to do so, making it “a fundamentally flawed conception of justice” (Anderson 1999, 295). Since egalitarian theory is grounded in the assumption of the basic moral equality of all people, and is meant to ensure that political systems recognize and uphold this equality, this test makes sense. If all human beings are morally equal, they deserve the same respect and concern, and a principle that fails to express such equal respect and concern fails to uphold the moral equality of those to whom it applies. In doing so, it fails to really be an egalitarian theory at all on the conception put forward in the first section of this chapter. This test also echoes Wolff concern with the value of respect as a central element of egalitarianism.

Anderson points to a multitude of different ways in which the various luck egalitarian accounts exhibit a failure to express such respect and concern. Broadly construed, these failures include abandoning those who make imprudent decisions, requiring absurd compensations for the unlucky, manifesting pity and disrespect towards those the theory tries to help, and being based on an objectionable atomistic individualism (Anderson 1999, 295-312). Anderson takes these failures to together provide a crushing indictment luck egalitarianism as a whole. Although many of the theorists who she grouped together (and the supporters of their views) have provided responses to these critiques (see, for example, Dworkin 2003 and Arneson 2004), many other political philosophers saw this as a fairly definitive defeat of luck egalitarianism, which opened the need for an alternative theory of egalitarian justice.

Samuel Scheffler has provided further objections to distributivism, again from a slightly different angle. He argues that focusing an egalitarian theory on distribution without grounding it in a relational moral or normative idea is deeply flawed (Scheffler 2003, 13). Although distribution is important for egalitarianism, it is not the only or the most basic concern, and most distributivist theories suffer from either under-developing or lacking altogether the more fundamental ideal. In reply, some proponents have argued that by rooting luck egalitarianism in the idea that disadvantages should track what is within peoples control, they are in fact grounding this version of distributivism in a moral ideal of equality (Scheffler 2003, 32). However, Scheffler argues that this is not adequate as a grounding moral idea, and equality is “most compelling when it is understood as a social and political ideal that includes but goes beyond the proposition that all people have equal moral worth” (Scheffler 2003, 33). The failures of the moral ideal undergirding luck egalitarianism shows in how some versions of the account,

such a Dworkin's, are even compatible with social hierarchies that many people view as paradigmatic of inequality (Scheffler 2003, 36).

A further problem Scheffler finds with the luck egalitarian version of distributivism in particular is the weight these theories put on distinguishing between luck and choice. The luck/choice principle at the foundation of all luck egalitarian theories "derives much of its appeal from an implausible understanding of the metaphysical status of the category of choice" (Scheffler 2003, 18). Although different luck egalitarians draw this line in different ways, all of these attempts result in counter-intuitive conclusions in one way or another. They either count too much in the category of being the responsibility of the individual, or too little. As a result, part of what is appealing about these theories is built on a false assumption: that it is possible to tell what one is and is not responsible for. Scheffler also argues that in trying to make these distinctions, luck egalitarianism is too "inward looking", resulting in the political institutions that enact justice needing to conduct invasive, moralizing scrutiny of individuals in order to determine whether or not that individual is responsible for their disadvantages (Scheffler 2003, 21). This parallels Anderson's concerns about humiliation, pity and disrespect.

Although these last two focus explicitly on luck egalitarianism, their critiques can be read as applicable to distributivism more generally. Lippert-Rasmussen argues that the critique of luck egalitarianism from both Anderson and Scheffler "stems directly from their rejection of the broader distributive ideal of justice" that is "concerned exclusively and non-instrumentally with the distribution of goods"(Lippert-Rasmussen 2018, 26), which he thinks is illustrated by ways they both characterize their target in terms of theories that focus on principles of distribution and equality as a distributive value (Lippert-Rasmussen, 24-25). The proposal of a relational approach as the relevant alternative by both Anderson and Scheffler is further evidence that their

critiques are not just about luck egalitarianism, but about distributivism more generally. They join Young in critiquing the distributive paradigm. Wolff's concern is with a more general pattern, of the ways theorizing had been going in egalitarianism, but because of the dominance of the distributive paradigm at the time, this too serves as a critique of the distributivist approach at least as it had been employed. Additional critiques could be discussed. However, I think these four are the most discussed as opponents of distributivism as a general category of egalitarianism, and they provide adequate motivation to justify the shift from a narrow focus on distribution to the most prominent attempt to construct an alternative approach: relational egalitarianism.

1.3.2. Debates in Relationalism

With the critiques of distributivism established, I now arrive at the relationalists' answer to the question of the point of equality. Part of Anderson's intent in asking that question in the first place is to set up this contrast between the distributivist views discussed in Section 1.2 and the kind of relationalist views which her democratic equality exemplifies. As mentioned earlier, the core principle shared by these views is that "the point of equality is to create and maintain conditions that enable people in a society to stand towards one another in relations of equality." However, the ways in which different theorists answer the other three questions differ widely from Anderson's, leading to varied interpretations within this camp as well.

Relational egalitarianism is much less developed as a theory of egalitarian justice, since it only really started in the last 25 years or so. As a result, in addition to the debates among relationalists, there are many issues and questions where the relationalist position is very under developed. The aim of this dissertation is to make some progress on one of those elements of

relationalist theory, focusing on what it means to relate as equals, but there are other such gaps. Despite these divisions and lacunae, some light can be shed on the shared intent behind the relationalist approach through looking at the cases that they agree are unjust. These are predominantly situations where social relations are structured by hierarchies which produce conditions of domination and oppression, particularly when those hierarchies are viewed as heritable across generations such as caste and class. However, even though relationalists seem to agree on these paradigmatic examples, many disputes remain which parallel the debates within distributivism. For relationalists, once the point of equality is answered, one must still ask what it means to relate as equals, where the site of equality is located, and who is included within its scope. Identifying clear injustices gives a shared starting point, but examining each of these questions in turn shows where many disagreements remain.

It is worth noting here that some egalitarians think it is possible for relationalist theories to have the same responsibilist orientation that defines luck egalitarianism, while remaining relationalist. Kasper Lippert-Rasmussen argues that the distinction between luck and relational egalitarianism has been overstated and is often represented in misleading ways. He proposes that here can be both luck (and I would argue more broadly responsibilist) and outcome (or strict) versions of both distributive and relational egalitarianism (Lippert-Rasmussen 2018, 3-7), leading to at least four categories of egalitarian theories: *distributive outcome egalitarianism* and *luck egalitarianism* on the one hand (Lippert-Rasmussen 2018, 2-3), and *outcome relational egalitarianism* and *luck relational egalitarianism* on the other (Lippert-Rasmussen 2018, 7). As a result, egalitarian relational accounts can either view “equality” in the relevant sense as strict equality or as equality conditional on responsibility.

(2) Equality of what?

For the distributivist, this question is about the currency or distributable good that a just society must distribute equally. For the relationalist, it is instead about what kinds of relations are the ones that are being referred to when theorists talk about “relations of equality”. The primary purposes of the rest of this dissertation will be to provide a systematic analysis of the most promising answers to this question in the existing literature. I will examine some of the ways in which such relations have been defined and characterized in what I consider the most thoroughly developed accounts to date, specifically those by Scheffler, Lippert-Rasmussen, Christian Schemmel, and Anderson, in order to determine whether any can provide the basis for a viable relational egalitarian theory of justice. In Chapter 2, I will outline what I take to be the minimum requirements for an adequate theory of relational egalitarian justice, and in Chapter 3 I will test each of these candidates against those requirements. I find that each candidate falls short of at least one requirement, rendering it desirable to continue looking for a more plausible account. In Chapter 4 I will propose my own alternative, which I call the *Cooperative Systems view*. I will therefore leave further discussion of this question to those later chapters.

(3) Where is the site of equality?

When it comes to the site of equality, the relationalist has the same basic options as the distributivist. Justice can be a matter of institutions (whether basic or more general), or of individual transactions. Unfortunately for the relationalist, the question of site becomes more complicated when the focus of the account is on relationships. This is because relationships are, at their base, developed through iterated interactions between individuals. However, these are still political theories of justice, and as a result, most political philosophers would argue that the

site must always be institutions in some form. In the existing theories, this often leads to a lack of clarity about where exactly relationalists locate the site of equality. This in turn can lead either to critiques of those theories as failing to present accounts of justice, or accusation that they are not really relational. Balancing the focus on being relational with remaining a theory of justice is going to be a difficult and important aspect of an adequate relational theory of egalitarian justice, and its importance and complexity is the part of the reason for the first three minimum adequacy requirements discussed in the next chapter. Although I will not present an argument for a particular site of relational egalitarian justice in this dissertation, I do think that there are some answers to this question that will not result in an adequate theory, such as too much focus on the individual or too narrow a definition of basic institutions.

(4) What is the scope of equality?

Like distributivists, relationalist theories often restrict the scope of equality to the nation state. Tan points out that Anderson's version of relational egalitarianism in particular requires a scope limited to the democratic state, because it is based in democratic reciprocity and democratic citizenship that can only hold within national borders with a particular political system (Tan 2008, 689). Tan views this as a mark against her view. However, depending on what a theorist identifies as the kind of relationships required and the site of relational equality, a relationalist view with a global scope is quite feasible. For example, Gillian Brock's account of global justice is committed to an ideal of democratic equality based in relations of equality that "promote equal respect, recognition and power" (Brock 2011, 76). Several recent theories, including those of Lippert-Rasmussen (2018, 146-147) and Schemmel (2021, 294-298) explicitly discuss their theory's ability to account for global justice. Although I will not attempt to answer the question

of scope in this dissertation, I see it as a virtue of a view if it leaves open the possibility of a global scope for egalitarian justice. On the other hand, a focus on relationships can also lead a theorist to instead narrow the scope of justice to a local level, where certain kinds of close personal relationships are easier to establish and maintain. Whether or not this more localised version of scope will be used also depend heavily on the answer to what kind of relations are “relations of equality”.

1.4. Mixed Approaches

So far, it may appear that I have set up the primary debate among egalitarians as being a dichotomous decision between distributivism and relationalism. Stating this division too strongly would set up a false dichotomy, as most egalitarians recognize that there are relational elements to distributivist approaches, and that relationalist approaches still need to pay attention to distributions. Even so, most theorists take the two to be based on competing principles of equality, and one of the two approaches is given priority in their account. There are a few theorists, however, who take a pluralist approach, where neither distribution nor relationships are seen as taking priority even at the most fundamental level of importance.

Wolff’s positive position, which he gives after the critique discussed in Sub-section 1.3.1., is a pluralist one. He puts both fairness and respect as the two values that “are equally central to egalitarianism” within an egalitarian ethos (Wolff 1998, 106), and argues that theorizing a “dynamic balance” of the tradeoffs between these values is the best way to generate

egalitarian institutions (Wolff 1998, 119-120).¹⁷ In fact, in his later article revisiting his critiques, he argues that “it is possible to reconcile a concern for both distributional and social equality by being clear about the goods social equality brings people, and having a wide enough concept of well-being, and a wide enough concept of distribution, so that these ‘goods’ are also included as those to be distributed” (Wolff 2010, 347).

Gideon Elford also presents a pluralist view, arguing that the two views of equality are “distinct, but potentially compossible” (Elford 2017, e81). He argues that both have normative significance within egalitarianism, and states that although they may appear in conflict they are not inconsistent with each other (Elford 2017, e81). Furthermore, he claims that something important is lost in each view if it is subsumed under the other. Equal social relations have what he calls an impersonal value, meaning “the value is not wholly reducible to the contribution made to individuals’ wellbeing”, making them valuable for other reasons that are not captured by distributive egalitarianism (Elford 2017, e84). Principles of distributive equality, on the other hand, may be “characterised as part of a broader ideal of relating to others as equals”, but at the same time “should be seen as constitutive elements with a normative authority of their own” rather than deriving their authority from the relational ideal (Elford 2017, e98). As a result, he advocates an approach to egalitarianism that thinks about the interrelations between these elements of equality, considering them “distinct but both valuable” (Elford 2017, e98).

¹⁷ I take the value of fairness to be in line with the luck egalitarian distributivist view, and the value of respect to be more in line with relationalist view. However, it is important to note that Wolff’s account in his 1998 article is focused on egalitarian values, rather than distribution and relational models. His 2010 article does turn to these models, and states that the conflict between fairness and respect can be seen as “an instance of a broader conflict between distributive and social models of equality” (Wolff 2010, 347), but the focus on values does distinguish him from other early critics of distributivism. Wolff defines an ethos as “a collection of values, which may sometimes conflict and among which there are no universal priority rules” (Wolff 1998, 118).

As mentioned previously, Lippert-Rasmussen's view is also mixed (although I will be examining the relational component of Lippert-Rasmussen's account as one candidate for what relational egalitarians mean by "relations of equality"). Starting from his argument that the distinction between luck and relational egalitarianism as it is usually presented is misleading, he then argues that distributive luck egalitarianism, relational egalitarianism, and what he calls dispositional egalitarianism are all both "consistent and distinct" (Lippert-Rasmussen 2018, 19). Based in that framework, he advocates for a "luckist, partially complete-lives version of relational egalitarianism" (Lippert-Rasmussen 2018, 20), rooted in a concern for fairness (Lippert-Rasmussen 2018, 19). Although this is a less pluralistic view than Wolff or Elford, it still presents an example of the ways in which some egalitarian theorists take a mix and match approach, using components of both relationalist and distributivist that they argue are compatible and desirable, but irreducible. Since he still considers his view relationalist, and he provides one of the few available attempts to explicitly articulate what is meant by relations of equality, I include his account as one of the four I examine in Chapter 3. However, his pluralism and contextualism poses some problems for his account as a relational view, which I will discuss in Section 3.2.1.

The focus of this dissertation is on theorizing components of a relational egalitarian account of justice. In the process, however, I intend to leave as open as possible the question of whether my account of relations of equality is compatible with some version or aspect of distributivism being equally fundamental, or if it takes lexical priority. I will assume that some attention to distribution will be a necessary component for an adequate relational egalitarian theory of justice at some point in the account, but I will not explicitly theorize that component except as it implicitly develops through my focus on what it means to relate as equals.

1.5. Other Approaches to Equality

In this overview, I have focused almost exclusively on the discussions of equality and justice that have taken place within mainstream analytic philosophy, drawing primarily from the liberal tradition. This focus reflects that of most of the recent literature on egalitarian justice. Of course, liberal theorists are not the only ones who care about and invoke the concept of equality.

Equality has long been a tenant of Marxist theory, and is also prioritized by theorists in other traditions such critical race theory, feminism, decolonial and post-colonial theory, queer theory, and others that would not generally consider themselves part of liberalism (even broadly construed). Unfortunately, for the purposes of this dissertation, I will only be engaging with these rich contributions to the conceptualization of equality when they directly intersect with the elements of liberal egalitarianism that are my focus.

The reason for this is strategic. Liberal egalitarianism in academic political philosophy has an almost hegemonic prevalence, but continues to be critiqued by a wide variety of other traditions on grounds that I think must be taken seriously. Many of those critiques include accusations that the liberal approach consistently fails with regard to the equality and justice they claim to pursue. The question of whether the dominance of liberalism is justified, or is itself the result of unjust colonial legacies and epistemic oppression, still lingers.

In order to establish whether liberalism deserves the place it has achieved in political philosophy, it is important to try to theorize the best version of the liberal egalitarian approach possible. With the strongest version identified, the questions of whether such a theory can answer

its critics can be more clearly answered. This project is in part an effort to identify such an account of equality, using a relational egalitarian approach from within liberalism that can address the concerns of many of the critics of liberalism who also hold equality as a theoretical and practical priority. Actually testing this account against those various critiques is a task that must be deferred to future work.

CHAPTER 2

Requirements for a Minimally Adequate Theory of Egalitarian Justice

In the previous chapter, I outlined the major debates that have shaped the literature on egalitarianism to date, and identified some of the various positions that have been taken in response to four key questions that all egalitarians must eventually address. I have also indicated that the focus of the remainder of this project will be on the relationalist answers to the second question, identifying the kinds of relations that are necessary for relating as equals. In the next chapter, I will begin evaluating the most promising answers to this question that have been proposed, and the theories built on them. To date, much of the discussion of relational egalitarianism has been focused on promoting the relational view of the point of equality in general, often through critiques of the distributivist view. There has not been much in depth analysis of the positive commitments of relationalism, particularly the often incompatible conceptions of equal relations which are implicit or explicit in particular versions of the view.

In order to proceed, and to determine the most promising account of what it means to relate as equals, a way to evaluate the different accounts must be determined. One method that has often been used in egalitarian theories in general has been to determine whether each theory results in counter-intuitive or morally objectionable implications when it comes to its treatment of particular cases. However, this has limited effectiveness. If someone does not share the

intuitions on which the objection is based, then this approach will likely result in an unhelpful conflict over whether it is the theory or the intuition that is correct.

When the debate is between different conceptions of egalitarianism, a more productive starting point is whether each conception meets conditions internal to egalitarianism for what makes for a viable theory of that kind. I will refer to these internal conditions as *minimum adequacy requirements*. Other egalitarians may disagree about what the specific internal conditions must be, but making clear what conditions I (or any other theorist) consider necessary for a plausible egalitarian theory makes it possible for the theorist to evaluate any egalitarian theory put forward as such. This provides grounds both for resolving critiques within egalitarianism and clarifying differences between egalitarianism and other theories of justice.

Of course, this approach to theorizing egalitarianism is also limited. Disagreements about what, exactly, the internal conditions for a viable egalitarian theory should be are likely to be revealed when such a method is employed, and this will complicate the debates that such conditions are meant to help clarify. There are already a variety of different desiderata that have been proposed for evaluating relational egalitarian theories specifically, by theorists such as Elizabeth Anderson and Daniel Putnam.¹⁸ Although this can incite fruitful debate, such

¹⁸ Anderson suggests four desiderata that are more demanding than the ones I suggest here as the minimum for adequacy. She argues that:

1. “such principles must identify certain goods to which all citizens must have access over the course of their whole lives”
2. “egalitarians should be able to justify such guarantees of lifetime accessibility without resorting to paternalism”
3. “egalitarian principles should uphold the responsibility of individuals for their own lives without passing demeaning and intrusive judgments on their capacities for exercising responsibility or on how well they have used their freedom”
4. “such principles should be possible objects of collective willing” (Anderson 2013, 34)

Putnam suggests three desiderata:

1. “relational egalitarian should make explicit the implications of their view for the content of first-order considerations of social justice”
2. “relational egalitarians should identify considerations of social justice that are not considerations for or against particular distributions”

disagreements do raise doubts about the usefulness of any single set of internal conditions for adequacy.

The conditions for viability I present here also do not directly address the question of whether relationalism or distributivism is the best approach to egalitarianism, or even whether egalitarianism is a good approach to justice, and even when comparing just relational theories, the requirements I am proposing only produce modest critical results. A relational egalitarian theory that fails one of the conditions I propose looks to be flawed in particularly concerning ways, but such a theory could still be the best available relational egalitarian view. A better, less flawed version should be sought, but that does not guarantee one will be found, and if it is not then the theory in question may be the best relationalism can produce. As a result, a theory that fails the adequacy requirements should not necessarily be written off, but efforts should be made to improve upon it and find a better alternative.

The purpose of this chapter is to present what I take to be the minimum adequacy requirements for a relational egalitarian theory of justice in particular. An adequacy requirement in the sense I am using it here is a necessary, although not sufficient, condition for the theory to be considered viable. As mentioned above, a theory can fail these requirements and still be the best version of relational egalitarianism available. Theories can also succeed in fulfilling these requirements and still be deeply flawed in ways that make them neither compelling nor acceptable theories of justice. It is a further possibility that a non-egalitarian theory could satisfy these minimal requirements but still fail to be egalitarian in the relevant sense. Obviously, these minimal adequacy requirements on their own are not enough. They are important as a starting point, however, because a theory that does not fulfill all these requirements is flawed in ways

3. “the considerations identified by relational egalitarians should be, in some clear and positive sense, relational” (Putnam 2016, 39)

that make it very questionable whether the theory is a plausible egalitarian theory of justice, and thus such a failure provides motivation to find an alternative account. Taken together, they collectively provide a minimum threshold that must be cleared before a relationalist theory can move on to other questions.

I take there to be six requirements, and will spend the remainder of this chapter spelling them out. To be a minimally adequate relational egalitarian theory of justice, a theory must be (1) clearly an account of the political concept of justice rather than some other normative concept (the Justice Requirement), (2) justified by the assumption and inference that defines egalitarianism (the Egalitarian Requirement), (3) not problematically perfectionist (the Avoiding Problematic Perfectionism Requirement), (4) able to address real world egalitarian movements (the Real World Requirement), (5) dialectically robust (the Dialectic Requirement), and (6) irreducibly relational (the Relational Requirement). While the first five are requirements for any egalitarian theory, the sixth and final one is specific to relationalist theories (although there would likely be an equivalent requirement for distributivist theories). In what follows, I will explain each of these requirements, their importance, and some of the ways in which theories could succeed or fail to fulfil them. I will then use them in Chapter 3 to test potential answers to the question of what kinds of relationships are the relations of equality required for justice within a relational egalitarian account.

Since the first five are meant to be requirements for any egalitarian theory of justice, they provide the basic criteria that must be fulfilled before a theory should even be considered a plausible version of egalitarianism. Of these, the first three are closely connected, and together ensure that the theory really is what it claims to be (an egalitarian theory of justice). The fourth and fifth requirements serve to ensure a minimum level of responsiveness to claims and critiques

from both within and outside of academia, which is epistemically and practically important for the theory's viability as a theory that could be implemented in the real world. The final, sixth, requirement is specific to relational theories, and is meant to ensure that the theory is clearly an instance of the particular kind of egalitarian theory that is intended. It is likely that any minimally adequate distributive egalitarian theory will have a parallel sixth requirement specific to the focus on distribution.

These requirements are, once again, not meant to settle the debate between distributivists and relationalists. The intent of this dissertation is not to defend relationalism but instead to determine the most promising conception of what it means for persons to stand in relations of equality. From that, an entire relationalist theory should then be built, which in turn would provide the grounds for such a defense of relationalism. Thus, the adequacy conditions are at this stage only meant to narrow down which of the candidates for the foundation of a relationalist theory are at least minimally adequate and therefore have the potential to be successful, in order to turn the attention of various egalitarian debates away from those accounts that do not meet even this baseline threshold for viability.¹⁹ For example, a theory that claimed to be egalitarian but could not explain why egalitarians should be in favor of legalizing same sex marriage would fail to fulfill the fourth requirement, and would to that extent be inadequate as an egalitarian theory. A viable egalitarian theory must be able to inform and be informed by real world social movements, and marriage equality is one of the core issues of one of the most prominent social movements of the current moment. Another, more subtle failure to meet the minimum for adequacy would arise in a theory that argued for a list of specific characteristics that a human life must manifest in order for that person to be treated as an equal, and the empowerment of

¹⁹ Minimum adequacy requirements could (and should) be used to test distributive egalitarian theories. However, that project is outside the scope of this dissertation's focus, and so I will leave it to someone else.

institutions to require that all human lives include those things. This would break the requirement that the theory not show a problematic level of perfectionism, as it would not respect individuals' own conceptions of the good life and their choices about what their lives should include.

As mentioned earlier, these requirements are necessary but by no means sufficient conditions for a minimally adequate relational egalitarian theory. It is likely that there are other requirements for an acceptable theory that I will not be discussing here, such as those suggested by Anderson and Putnam.²⁰ However, these six requirements present a starting point, which can be used to draw out those theories that do not even clear this minimum threshold. This process of elimination should allow theorists to narrow down which versions and components of relational egalitarianism provide the best grounds for an alternative to distributive egalitarianism, and therefore should be given the most attention, while in the process diagnosing what has gone wrong with the theories that fail to meet this minimum. Giving clear reasons why a theory falls short of adequacy helps to create a clearer picture of what a successful egalitarian theory must include, providing further resources for constructing a positive account of egalitarianism.

2.1. The Justice Requirement

The first requirement is that the theory must clearly be an account of justice rather than some other, possibly neighboring, normative concept . Although this requirement seems intuitive, it is

²⁰ I am not using the desiderata set out by Anderson for two reasons. The first is that hers are much more stringent requirements, which I think go beyond minimum adequacy requirements. The second is that she is more focused on demonstrating the failures of distributivism than testing different conceptions of what it means to relate as equals. Since the latter is my project here, a different set of requirements is appropriate. Putnam's project is also focused on relationalist theories, and there is some overlap in the requirements we propose. However, his requirements are based on a framing of the debate between relationalists and distributivists that I do not share, leading to some differences in criteria.

complicated by the many ways in which the term “justice” have been used over the course of its long history, even when it comes to the political context. Many ancient philosophers, such as Plato in *the Republic*, advanced a comprehensive view of justice as the most fundamental good in human lives, and viewed the justice of individuals and of institutions as being of the same sort (Talisie 2016, 94). This expansive definition is much less common in contemporary discussions within philosophy, which tend to focus instead on a narrower conception of justice as the kind of value that only belongs to governmental institutions, primarily at the state level. In most contemporary discussions, concepts like “just” or “unjust” are only attributed to individuals when they are indexed to the particular roles or offices the person holds within those institutions (Talisie 2016, 96). This is in sharp contrast to Plato’s view of justice within institutions as a direct analogy to the justice of individuals, and primarily understandable in such terms (see Plato 2004). I am open to the possibility that justice should be understood in this more comprehensive way. However, for the purposes of this dissertation as a project in political philosophy, I will be focusing on justice in the narrower sense, as the Rawlsian “first virtue of social institutions” (Rawls 1999 [1971], 3).²¹

As a result of locating justice in institutions, what justice allows and requires is going to be narrower in its breadth than what was required by the ancients’ more comprehensive conceptions of justice. This is because what institutions with coercive power may do, and what they may in turn dictate for individuals, is always more limited and requires more justification than what a person’s own ethics and well-being may require from them. There are things that

²¹ This focus does push in the direction of a particular answer to the question about the site of justice discussed in Chapter 1, but it leaves the question of the relevant institutions open enough that it does not foreclose much in that debate. This simply ensures that justice is being used as a political concept, rather than a more comprehensive ethical one. It is also the way that the concept of justice is typically constrained in contemporary discussions of political philosophy.

may contribute to a person's well-being but that it may not be unjust for them to lack, and things that are morally good or even required for individuals that it would still be unjust for institutions to impose. For example, having a fulfilling romantic relationship is something that many people think is necessary for well-being and a good life. However, lacking such a romantic relationship is not an injustice,²² and such relationships are certainly not something that most people consider it necessary or even permissible for institutions to provide. Furthermore, there may be things that are just for institutions but generally considered morally bad if done by an individual. Most people consider it just for the state to imprison and punish those who break the law (Talisie 2016, 97). However, they would consider it immoral and criminal for an individual to keep someone that stole from them locked in their basement.

These brief examples gesture at how the parameters of what is good for people as individuals do not map cleanly onto the limits of what is within the purview of institutions with the potential to wield coercive power. This is particularly the case in a diverse society where there is no single conception of the good held by all. When a society includes people with vast variations in their religion, culture, personal experience, and belief more generally, it leads to a diverse set of conflicting conceptions of the good. No single one, or set, of these conceptions could be enforced by the coercive power of social institutions without violating the kinds of values and ideals which principles of justice are intended to uphold.

Although I will be conceptualizing justice in the narrow sense as a virtue of social institutions, I follow many feminist political philosophers in understanding social institutions as something broader than what was the focus of Rawls' original account and that of many who have followed him (see Okin 1989, 8-10; Pateman 1988, 41-43, Young 1990, 21). I will not

²² See Amia Srinivasan (2021) for work questioning this assumption.

provide a full argument for what social institutions should be the focus of a theory of justice here, as such an argument is outside the scope of this dissertation. In brief, I view justice as relevant to any sphere of society that is structured by hierarchical power relations with coercive results.²³ However, for the purposes of this project, I will be limiting the relevant site of justice to the institutions of government, the family, and the economy.

For egalitarians, the purpose of justice is to determine what is necessary in order to organize our society as a society as equals (Waldron 2017, 12), specifically in what is assumed to be a situation of scarcity and reasoned disagreement (Talisie 2016, 100). Doing so requires laying out the principles by which the institutions of a society, which are put in place in order to regulate collective life, determine who has what burdens, advantages, rights, and responsibilities, and how conflicts or disagreements will be arbitrated. The institutions of government, the family, and the economy have the most impact on the success or failure of organizing society as one of equals amidst scarcity and reasoned disagreement, and therefore must be the focus of that regulation.

Although I am employing a slightly broader version of the institutional conception of justice than is often used by political philosophers, this conception still defines a restricted domain that contrasts with a more comprehensive account of justice as general well-being, ethics, or humanitarianism. I maintain a focus on what is allowable and desirable from institutions that form the basic structure of society viewed as a shared enterprise (although how “basic” is contestable). In addition, an egalitarian theory that successfully fulfills the requirement of being a theory of justice will not prescribe what is good or valuable for or about any

²³ If part of the reason that egalitarian justice is important for the legitimacy of a political system is because coercive power is a *prima facie* violation of basic moral equality, then justice should be of similar concern in any space where coercive power threatens basic moral equality.

individual person. It will maintain the distinction between justice and other social goods that are often hard to distinguish in some versions of a more comprehensive account, such as authenticity, personal integrity, autonomy, agency, dignity, or freedom.

Clearly being an account of justice is, then, the first requirement for a minimally adequate egalitarian theory of justice. The Justice Requirement can be stated as follows:

- (1) A theory meets the justice requirement if that theory only presents principles that reside in and determine the institutions and systems of institutions in a society that are structured by hierarchical power relations with coercive results, which determine the coordination of benefits, burdens, advantages and disadvantages in that society.
 - (1.a) A theory fails to meet the justice requirement if that theory presents principles that dictate the ethical obligations of individuals, their conceptions of well-being, and other elements of individual lives that are not within the prescriptive purview of institutions.

2.2. The Egalitarian Requirement

The second requirement for a minimally adequate relational egalitarian theory of justice is that it must be justified not only by the basic moral equality of all persons, but also by the additional premise that upholding that basic moral equality entails making equal some additional, relevant aspect of shared life. This requirement is what ensures that it is a truly *egalitarian* theory of justice. For an egalitarian, understanding the content of justice, diagnosing the problem of injustice, and prescribing principles and policies for achieving justice must each be motivated by the equal moral worth of all persons. However, that grounding in basic moral equality is not by itself enough. Many theories that are not egalitarian can be justified in terms of basic moral equality. What makes a theory egalitarian is that it takes the additional step, claiming not only that all people are morally equal but also that ratifying basic moral equality requires some

particular action on the part of institutions to render some additional, politically relevant aspect of peoples lives equal. If that politically relevant thing is unequal, the society is an unjust one, because it fails to uphold the basic moral equality assumed by most theories of justice. As such, the justification for any principles and policies recommended by the theory must also be traceable in some way to that inference. Such a theory fulfills the Egalitarian Requirement, which ensures it fits the conception of egalitarianism as it was defined in Chapter 1.

As mentioned, many theorists that are not considered egalitarian (or even who are anti-egalitarian) share the assumption of basic moral equality. John Stuart Mill's utilitarianism counts the utility of each individual as equally morally relevant (Mill [1871] 2002, 105), which implies basic moral equality. However, utilitarianism is set up as the opposition for many egalitarians, including Rawls, since it often leads to rendering things unequal in order to maximize utility. Even when the utilitarian calls for rendering something equal, it is based on grounds other than people's basic moral equality. The utilitarian calls for making something equal only when such a policy maximizes utility, and specifically because it does so. Similarly, Thomas Hobbes grounds the motivation for the creation of the social contract and the state in both the natural equality of all humans and a "normative claim that no one is naturally subservient to another" (Wolff 2011, 2). However, the state he prescribes entails great inequality both between the subjects and the sovereign (Brooke 2020, 1408; Hobbes [1651]1996, 115-122) and among the subjects (Brooke 2020, 1409). Even Robert Nozick at least implicitly justifies his Entitlement Theory of justice in terms of basic moral equality. His objection to egalitarian distributive justice is that redistributing goods in order to achieve an equal distribution violates people's rights such as choice and freedom (Nozick [1974] 2014, 401). This implies that these are equal rights held by all persons, which would presumably be the result of their basic moral equality. In each of these cases, the

assumption of basic moral equality is held. However, none of them see upholding that moral equality as requiring that something additional be made equal, and so they are not egalitarians in the sense relevant here.

On the other hand, the historical political theories that are often seen as the foundations of egalitarianism as it is known today do share both the assumption and inference that define egalitarianism. John Locke argues that all human beings are born free and equal, and then takes this to entail that certain rights being held equally by all within political society (Locke [1764] 1980, 65-68). Jean Jacques Rousseau argues for the presence of equality in the state of nature, and prescribes various kinds of political, social and economic equality in his social contract (Rousseau 1997, 78). Rawls' theory of justice is also clearly grounded in basic moral equality in this way, as the principles he argues for are justified on the basis of being what free, equal and rational persons would accept in a situation in which all particularities were removed, (Rawls [1971] 1999, 17) and those principles entail making equal basic liberties, access to certain offices, and opportunity (as discussed in Chapter 1).

In contemporary egalitarian theories, both the justification in the assumption of basic moral equality and the inference to rendering equal manifest in many different ways. Dworkin argues that a legitimate government must be one that “attempts to show equal concern for the fates of all those it governs and full respect for their personal responsibility for their own lives” (Dworkin 2013, 16). According to him, this can best be achieved through the distribution of resources using a hypothetical auction that leads to a result without envy, and an insurance scheme to protect against brute luck (Dworkin 1981). This achieves a distribution that is equal in a responsibilist sense. Anderson emphasizes that egalitarian political movements oppose hierarchies of intrinsic worth among human beings as a direct result of their assertion of the

equal moral worth of all persons (Anderson 1999, 312), so that justice requires rendering equal the relations in which people stand to each other (Anderson 1999, 313). Kasper Lippert-Rasmussen has distinguished between regarding someone as an equal and treating someone as an equal (Lippert-Rasmussen 2018, 16), but both regard and treatment can be seen as things that are made equal in order to uphold basic moral equality. Others, such as Kristin Voigt and Christian Schemmel, have also identified expressing equality as an additional, distinct interpretation of what should be rendered equal (Voigt 2018, 439; Schemmel 2021, 13). All of these different interpretations, as well as many others, fulfill the egalitarian requirement, so long as in each of them it is clear how the theory is grounded in both the assumption of basic moral equality and the inference that justice requires rendering something equal. A theory missing either of these components may still be egalitarian in some sense, but it is not the sense that is relevant to the debates at hand.

This second minimum adequacy requirement then, ensures the theory is really egalitarian, and it can be summarized as follows:

- (2) A theory meets the egalitarian requirement if that theory is justified by the fact of moral equality and infers from that fact that the justice of a political system requires it rendering equal something that impacts politically relevant benefits and burdens.
 - (2.a.) A theory fails to meet the egalitarian requirement if it is or could be grounded in an account of persons that is antithetical to or distinct from all persons having the same basic moral worth, or if it rejects the inference that such basic moral equality requires the political system rendering equal something specific in peoples' lives.

2.3. The Avoiding Problematic Perfectionism Requirement

The third requirement is that a minimally adequate egalitarian theory of justice must not be problematically perfectionist. In general, perfectionism in political philosophy is the view that “the state should favor particular moral ideals” over others, in order to “promote valid or sound conceptions of the good and discourage worthless ones” (Wall and Klosko 2003, 1). The anti-perfectionist position, on the other hand, argues that the state should be impartial when it comes to what conception of the good is right or best. It is important to note that political theories of neutrality about conceptions of the good can focus on either the justification or the effect of policies and actions (Wall and Klosko 2003, 8).²⁴ For the purposes of this requirement, I am concerned exclusively with the question of justification.

The perfectionist stance is one that most political philosophers in the liberal tradition object to, as they worry that it both justifies too much coercion and will create an unequal and paternalistic state that favors some people over others as a result of their conceptions of the good (Wall and Klosko 2003, 17). If it is true that favoring a particular conception of the good results in the unequal treatment of people, depending on whether or not they share that conception of the good, perfectionism does indeed seem anti-egalitarian. However, there are perfectionists who also consider themselves egalitarians who deny that there is a necessary connection between valuing some conceptions of the good over others and valuing some people over others (Haksar 2003, 92).

Nevertheless, even if the perfectionist is not committed to the view that preference for a particular conception of flourishing results in preferential treatment of certain people, perfectionism may still pose a problem for egalitarianism. When the state favors a particular

²⁴ Neutrality and perfectionism are often seen as opposing theories, but I do not want to commit to endorsing neutrality in an extensive theoretical sense here. The distinction between neutrality in justification or in effect that Wall and Klosko outline is, however, useful in thinking about perfectionism in justifying a theory as opposed to its effects, and where neutrality should occur.

conception of the good among a variety of such conceptions about which there is reasonable disagreement, and views the normative merit of that conception as sufficient justification for its policies and practices, this entails the judgment that the people who do not hold that conception of the flourishing are wrong, or at the very least have a worse conception of the good. This moral judgment fails to uphold the basic moral equality of all people, as it implies they are viewed through a kind of moral hierarchy. This is why some critics of perfectionism focus on objections related to factors such as reasonable disagreement, fallibilism, and the risks of elitism (see Nussbaum 2011, 15; Sher 1997, 2; and Arneson 2000a, 38 for discussion of these objections from those friendly to perfectionism), and why most liberals argue that egalitarianism should be an anti-perfectionist position.

To complicate matters, some proponents of perfectionism argue that egalitarianism actually presupposes perfectionism (Haksar 2003, 96). For example, it could be argued that using the fact of basic moral equality to justify what is owed according to justice (that something be rendered equal) assumes a particular conception of the good life, if only in a very modest sense. The inference from basic moral equality to the requirement to render something equal on the part of institutions involves a claim about what is objectively good for persons because of their basic moral equality. Furthermore, in order to identify what should be rendered equal, there has to be some presumption of what is good that is motivating the identification of the thing to be equalized. Relational egalitarianism adds further perfectionist implications, as it introduces the idea that social relations of a particular kind are necessary for justice and should therefore be encouraged (or even required) by institutions, seemingly on the basis that these relations are good for people as moral equals.

Perfectionism, therefore, poses a puzzle for egalitarians, and relational egalitarians in particular. I do not intend this minimum adequacy requirement to take a firm stance in the debate between perfectionists and anti-perfectionists. However, I take it to be the case that embracing a too extensive perfectionist position will pose a problem for an egalitarian theory of justice, at the very least because it makes the egalitarian position more vulnerable to some of the common objections from anti-egalitarians about invasiveness and coercion. The more vulnerable the egalitarian position is to such accusations, the less plausible it is as a theory of justice, since these are concerns that egalitarians in general take seriously as problems that need to be addressed. There are many infamously anti-egalitarian positions, such as Aristotle's teleological account, that use perfectionism to assign a different and hierarchical perfectionism to different kinds of humans, and therefore to justify things like slavery (Aristotle 1995, Chapter 5, ebook). Most egalitarians take this as a reason to be wary of perfectionism.

On the other hand, I also have suspicions that some degree of perfectionism is unavoidable for any egalitarian theory of justice. As such, I will assume for the purposes of these adequacy requirements that it is possible for a theory to incorporate a weak perfectionism as part of the justification for rendering equal some relevant element of peoples' lives while remaining a minimally adequate theory of egalitarian justice. A strong perfectionism, however, will disqualify the theory as a plausible egalitarian theory of justice according to these adequacy requirements.

Where, then, is this line between an acceptably modest version of perfectionism and a problematically strong perfectionism? I take a problematic perfectionist theory to be one that calls for political principles or policies that exceed the bounds of what most people would see as acceptable prescriptiveness by political structures and social institutions about how members of

the society should conceive of well-being or the good life. “Most people” here should be understood as a substantial majority of those who are committed to moral equality and who are relatively well informed about the relevant facts.

More specifically, I am concerned with theories that prescribe political principles or policies that dictate what a good life looks like in ways that are controversial, that result in an elitist, authoritarian, or paternalistic political system, and which fail to recognize fallibility and reasonable disagreement in theories of the good life. For example, if a society decided that enjoyment of fine arts was a necessary part of the good human life, based on something like John Stuart Mill’s utilitarian conception of the higher pleasures (Mill [1971] 2002, 56-59), and as such the state should subsidize individuals attending the opera and visiting art galleries, it would be problematically perfectionist. There may be other good reasons for the state to do so, but it would not be as a matter of justice.

What most people committed to equality find controversial will be an empirical question. However, some intuitions can be used for the purposes of the analysis in the next chapter. For example, it seems very likely that conceptions of flourishing based on religious assumptions, ideological commitments, or prescriptions about what people should want or prefer will cross the line into the problematic.

Recall that neutrality and perfectionism are here considered matters of justification, not outcome. Therefore, a theory will be problematically perfectionist if it is justified in terms that involve a comprehensive conception of the good that is controversial among those who are already committed to moral equality, and if it uses that to in turn justify theories, principles or practices that are coercive. It must be neutral among conceptions of the good, so long as those

conceptions are committed to moral equality and are permissible among moral equals. It must further be justifiable to those who hold different and even conflicting conceptions of the good.

In some ways, this is a more lenient theoretical requirement than is held by the liberal theorists who argue that complete neutrality with regard to the good and well-being in human life is necessary in a society containing diverse interests, ends, and conceptions of the good.

However, my conception of problematically perfectionist views captures the elements of perfectionism that are most concerning to egalitarians, while also leaving open the possibility that there may some such theories that do not have those problematic consequences and may even help to advance egalitarian theory.

This third requirement can be put concisely as follows:

- (3) A theory meets the avoiding problematic perfectionism requirement if that theory is not justified by a controversial conception of human flourishing or the good human life, where what is controversial is determined empirically.
 - (3.a.) A theory fails to meet the avoiding problematic perfectionism requirement if it is justified by a comprehensive conception of well-being or flourishing that a substantial majority of members of the society would reasonably disagree with, particularly if it uses that conception to justify coercion.

2.4. The Real World Requirement

Requirement four now turns the focus of these criteria towards the real world implications of the theory. If the egalitarian theory is to be viable, it must be able to inform and be informed by the concerns and priorities of real world egalitarian movements. This requirement is based on the assumption that the intent of theorizing egalitarian justice is to provide a theory that introduces principles that can and should be applied to the real world. Although not a consensus among all

political philosophers (Cohen states that political philosophy “is not what we should do but what we should think even when what we should think makes no practical difference” (Cohen 2003, 242-243)), most seem to at least implicitly share the intent to make theories of justice that are translatable into real world policies and institutions. For example, Dworkin explicitly details how the hypothetical insurance scheme from his thought experiment could be applied to the real world where people are not all stranded on an island (Dworkin 2013, 23). Rawls also advocates attention to real world situations and practical application, although only after the ideal for basic institutions of society are decided on (Rawls [1971] 1999, 343).

However, it is with Anderson that attention to real world social justice movements becomes an explicit and central part of theorizing justice itself, rather than a move that comes only after the theory is in place. She urges egalitarian theorists to “recall how egalitarian political movements have historically conceived of their aims”, and then identifies the mismatch between those aims and the focus of most contemporary discussions of egalitarianism political philosophy as being a serious flaw in recent theories (Anderson 1999, 312). The influence of Sen and his capabilities approach is clear here, as Sen argues for a method of non-ideal theory, which puts primary attention on the comparison of better and worse conditions with attention to real world injustices (see Sen 2006 for his argument for a comparative rather than transcendental theory of justice). Other theorists who also aim to develop non-ideal theories of justice show a similar grounding in real world conditions and concerns, and make frequent reference to the actions and motivations of such movements. Some of them argue that facts about the real world, such as the claim that human nature is inherently selfish, do not necessarily rule out principles as normative requirements (see Estlund 2011, 218).²⁵ Nevertheless, attention to such facts, as well as more

²⁵ David Estlund is specifically applying his argument to institutional principles, which he defines as a principle that “describes institutional arrangements as part of a broader prescription or proposal, even if the described arrangement

phenomenological claims about what is experienced as injustice and inequality by people in non-ideal conditions, can provide important information for the development of egalitarian theories.

It is not, however, always clear what being able to inform and being informed by real world social movements will involve, taken as a requirement for a theory. For the purposes of this discussion of an adequate egalitarian theory, I understand this requirement to involve the theory showing clear attention to the cases where people on the ground apply the labels “justice” and “equality” (or their opposite), while at the same time remaining both aspirational and critical about what such claims mean. This will likely result in a kind of gradient of theory applicability to the real world, once it clears a minimal threshold for adequacy. The minimum threshold is that no adequate theory can ignore or reject the core claims of major social justice movements that would be generally considered uncontroversial by anyone who holds the assumption and inference of egalitarianism. Above that, the more a theory is informed by and able to inform real world conditions, the more appealing it will be from the point of view of those who think that the intent of theorizing justice is to have an impact on real world events (which I assume includes most egalitarian theorists).

Often, people on the ground who are experiencing an injustice first hand will be better at identifying examples of the concept than the theorists, who by nature of their position within academia are usually in a better social and economic position. A theory that is out of touch with these people and the realities of their lives will be irrelevant outside of the ivory tower, and an irrelevant theory not only seems to run counter to the very motivations for a concern for justice

itself is not proposed or prescribed”, and contrasts it with both institutional proposals and fundamental political principles” (Estlund 1981, 218-219). Although equality is identified by Estlund as a fundamental political principle, not an institutional principle, the idea that facts are not requirement blocking seems to also apply at the higher level of abstraction presented by the more fundamental principles.

in the first place (such as actually informing how we live together in order to help us live well) but may influence greater injustice as a result of its disconnection from reality.

It is possible for a theory to be abstracted from these realities and the social movements that try to address them, and yet still be plausible as a theory of justice in political philosophy. In fact, it may be desirable to use that kind of abstraction, to provide an ideal of justice to aspire to that may seem out of reach given certain facts about the world. That kind of aspirational ideal can be valuable as a motivating and guiding force in practical attempts to make things more just in non-ideal circumstances. However, there is a minimum level of engagement with real world events and movements below which a theory will cease to be relevant or viable even in the abstractions of academic theory.

There is, of course, always a risk that comes with taking cues on conceptual content from the popular use of a term in the real world. Terms like “injustice” and “inequality” are sometimes applied to cases which most theorists would deny are instances of any such thing. For example, white supremacists often use language of discrimination and rights violations to portray themselves as victims of an injustice rather than perpetrators (Berbrier 2000, 179-186). No egalitarian would view these as valid claims of injustice and inequality, and just because a real group uses the term injustice does not mean that the case is in fact an injustice. This is why a theory of justice must be applicable to the real world but remain critical as well as aspirational. An important aspect of a successful egalitarian theory of justice, beyond meeting the minimum adequacy requirements outlined here, will be its ability to differentiate between valid and invalid claims of injustice and inequality. However, this risk does not undermine the necessity for a minimally adequate theory of egalitarian justice to be able to engage with and explain the valid real world claims when they are identified.

The fourth requirement for a minimally adequate theory of egalitarian justice thus ensures the relevance of the theory, and can be summarized as follows:

(4) A theory meets the real world requirement if that theory able to inform and be informed by the particular issues and cases that real world social justice movements with valid claims consider instances of inequality and injustice.

(4.a.) A theory fails to meet the real world requirement if it altogether ignores real world social justice movements, fails to include particular issues and cases that are widely considered injustices by real world social justice movements, or is unable to exclude issues and cases that are considered to clearly not be cases of injustice by most real world social justice movements.

2.5. The Dialectic Requirement

The fifth requirement, and the final one shared by all egalitarian theories of justice, is that the theory must be able to respond to its critics, and in its turn must not be vulnerable to the critiques it makes of other theories. It must furthermore do so in a way that engages with the ongoing debates over egalitarianism, conversant with the current state of the field. This dialectical robustness is a requirement for any adequate theory, as a theory that cannot respond to critiques fails one of the basic requirements of a good argument. In addition, when it comes to egalitarian theories of justice this dialectical robustness is particularly important because of how comprehensive the debates in and around egalitarianism have already been. The debates among egalitarians have been an intense focus of mainstream political philosophy for half a century, creating well-trod dialectical pathways that any attempt to make a new contribution must grapple with. Theories that do not do so (but still intend to be positions in egalitarian theory) are unlikely to move the debate forward in productive ways, as they will not recognize the existing dialectical exchange and may backtrack over terrain that has already been saturated. This is not to say that

all engagements with egalitarianism must fit within that existing dialectic. Important work has and will be done critiquing and disrupting the current field of egalitarian literature. However, even those that intend to reframe the conversation should engage with the existing field in order to help justify that change in a way that helps ensure those interested in the same issues are not talking past each other.

This attention must apply to both potential (or existing) critics and to how one's critiques may apply to one's own theory. For example, Anderson's identifies a kind of invasiveness as one of the problems with luck egalitarianism, as it has to pass judgment on the private affairs and personal characteristics of individuals in order to determine what disadvantages are caused by luck and which are not (Anderson 1999, 305-306). However, a similar critique about invasiveness could be leveled against Anderson, as identifying whether or not someone has certain capabilities also requires passing judgment on their private affairs. Unless Anderson can respond, in order to demonstrate either how her account avoids this accusation or why it is not a problem in her case, then either her critique of luck egalitarianism is illegitimate or her own account is undermined as well. In either case, an unsuccessful response would show Anderson's argument against luck egalitarianism and in favor of democratic equality does not meet this minimum adequacy requirement.

This requirement does not mean that every objection has to be completely refuted in order for a theory to be minimally adequate. It does, however, mean that at the very least a satisfactory response must be available that either mitigates the severity of the objection in such a way that the strengths of the account outweigh the weaknesses, or shows why the objection is not relevant. If this cannot be done, then the theory is not an adequate theory at all.

To summarize, the final requirement for all minimally adequate egalitarian theories of justice can be stated as follows:

(5) A theory meets the dialectic requirement if that theory is able to respond to (although not necessarily defeat) all sound counter-arguments and objections, and is not vulnerable to the critiques it levels against other theories.

(5.a.) A theory fails to meet the dialectic requirement if it avoids or ignores sound critiques, and is subject to the same critiques that it raises against other theories.

2.6. The Relational Requirement

These first five requirements outline what one should minimally expect from any egalitarian theory of justice. However, since the focus of this dissertation is on relational theories in particular, it is important to identify an additional requirement that all relationalist theories must also fulfill. All egalitarian theories assume the fact basic moral equality, and then infer that upholding that equality requires rendering equal something else. A relationalist version of egalitarianism interprets the point of equality as being to create and maintain conditions that enable people in a society to stand towards one another in relations of equality. The question of what it means to relate as equals will be the focus of the remainder of this dissertation, but regardless of the answer, the theory must be irreducibly relational. This requirement ensures that each of the theories being considered remain viable not only as egalitarian theories but specifically as relationalist ones.

This additional requirement is necessary because the relational versions of egalitarianism are usually presented as an alternative to distributive egalitarianism. Likely due to the relationalist focus on contesting distributivism, many of the egalitarian

opponents of the relationalism have critiqued the approach as a whole by arguing that it fails to present a distinct theory and can be subsumed under distributivism (see Lippert-Rasmussen 2018, section 7.4 for a discussion of this issue from a relationalist; and Cordelli 2015, 87 for an instance of this subsumption). Most of these critiques suggest that the kinds of relationships with which relationalists are concerned can be reduced to distributive terms in various ways, making them either something that can itself be distributed or that is only important as a result to the distributions they produce or are produced by. Theorists of both relationalist and pluralist accounts of egalitarianism, such as Elford, Scheffler, and Young, have engaged with and rejected this reduction (Elford 2017, e82; Scheffler 2015, 22; Young 1990, 24). However, the fact that this is an objection that is commonly raised throughout the literature indicates that a relational egalitarian theory of justice must be irreducibly relational if it is to be adequate as a relationalist theory.

What makes relational egalitarian theories distinct from distributive ones is a normative claim about what is most fundamental to justice and equality. For a theory to be irreducibly relational, it must view relationships as prior to distributions in the order of explanation for whether a situation is equal or unequal, just or unjust. For the relationalist (as opposed to a pluralist or a distributivist), a distribution of some good is unjust if and only if, and only in so far as, it is the result of or constitutive of the members of a society not standing in relations of equality to one another. Relating as equals is both a necessary and sufficient condition for justice, and the extent to which distributions matter derives from or is constituted by that foundation.

Accounts that are not irreducibly relational may still be minimally adequate as egalitarian theories of justice. However, if they can be reduced to or subsumed under distributionism (or any other theory), and therefore do not fulfill this requirement, then they cease to be relationalist accounts in a sense that makes them distinct from distributivist views. Since one of the key characteristics of theories that identify themselves as relationalist has been the attempt to define an alternative to distributionism, a theory that fails to be an alternative is no longer minimally adequate as a relationalist theory. Distributivist theories will likely have a similar sixth requirement, which will define them as distinctly distributivist theories (although I will not define what that requirement may be here). It should also be noted again that these are just the *minimum* requirements for adequacy. Fulfilling all six of these requirements is necessary for an adequate relational egalitarian theory of justice, but it may not be sufficient. This framework is intended as a starting point.

The requirement that ensures a theory is relational, as well as adequate as an egalitarian theory, is in short:

- (6) A relational egalitarian theory meets the relational requirement if that theory clearly and irreducibly conceives of justice as fundamentally a matter of relating as equals.
 - (6.a.) A theory fails this requirement if it can, without distortion, be framed as primarily or exclusively a matter of distribution or some other non-relational kind of egalitarian theory.

2.7. Conclusion

In this chapter, I have presented a framework of six requirements that form the minimum threshold that an egalitarian theory of justice, and specifically a relationalist theory, must pass in

order to be considered adequate as this kind of theory. The next step in trying to determine the most viable conception of relational egalitarian justice will be to apply each of these minimum adequacy requirements to various relational egalitarian theories. Such a project should begin with examining the most well fleshed out theories of relational egalitarian justice in the current literature, such as those proposed by Anderson (1999), Samuel Scheffler (2003, 2010, and 2015), Schemmel (2021), and Lippert-Rasmussen (2018). Examining the most well developed accounts of relational egalitarianism through the lens of the requirements outlined in this paper will give a starting point for determining how flawed current relationalist conceptions are, and what directions should be taken to develop better, viable theories of egalitarian justice. This is the first step towards determining the best version of relational egalitarianism, to be used as an alternative to distributive egalitarianism in further debates.

CHAPTER 3

What Kinds of Relations are Relations of Equality?

The first two chapters of this dissertation have mapped the terrain of contemporary egalitarian literature by surveying key debates and positions within them, and then provided a framework for evaluating such theories based on their ability to meet certain minimum requirements. In this chapter, I will take up the framework developed in Chapter 2, and use it to test four theories that provide the most promising current candidates answering “what kinds of relations are relations of equality?”

As Lippert-Rasmussen has pointed out, the topic of what it means to relate as equals has not received the attention it deserves in discussions of relationalist theories to date (Lippert-Rasmussen 2018, 6). This is to the detriment of relationalism as a whole, since without a clear account of what kinds of relations are relations of equality it is next to impossible to provide a satisfactory answer most of the other questions about a theory of justice that egalitarians must address. By evaluating these four relationalist theories, using this set of adequacy requirements and focusing specifically on what each account proposes as the kind of relations required for equality, I intend to contribute to remedying that gap in the literature.

I chose these specific theories because they are the most completely articulated theories of relational egalitarian justice in current literature and are therefore closest to viability, although in some of them the account of relations of equality is only implied. By testing these theories in

this way, I intend to introduce a framework for diagnosing the strengths and the failures of the most promising articulations of relational egalitarian justice. By identifying the account (or accounts) that best fulfill these requirements, this project will provide a foundation for further discussions within relational egalitarianism about what such a theory of equality demands, as well as providing more robust grounds for engaging in debates with other kinds of egalitarian theories. The four theories that I will consider are:²⁶

- (1) Samuel Scheffler's egalitarian deliberative constrain
- (2) Kasper Lippert-Rasmussen's pluralist account
- (3) Christian Schemmel's liberal non-domination
- (4) Elizabeth Anderson's democratic equality

It should be noted from the start that all four of these candidates fall short of at least one of the minimum adequacy requirements. Still, the ways in which these theories succeed and fail provides a framework for diagnosing the strengths and the failures of both current and future articulations of relational egalitarian justice. For each of the four theories in turn, I will first summarize the main points of the theory as a theory of justice and identify what the theory proposes as relations of equality. I will then evaluate that concept against the six minimum adequacy requirements outlined in Chapter 2, and discuss how the theories' success or failure regarding these requirements indicates their plausibility as a viable relational egalitarian theories of justice. Each of these theories does hit on important aspects of what it means for relations to be structured in ways that ensure people stand as equals, but since all four fall short of at least

²⁶ I do not claim this chapter to be an exhaustive analysis of existing theories. There are several other theories that could have been examined in this chapter. However, I find that each of them provides a less developed account of what it means to "relate as equals" than the ones discussed here. Although I have chosen to analyse two theories that only imply an answer to what kinds of relations are "relations of equality" rather than addressing the question, from Anderson and Scheffler, those two theories have a robust positive theory of relational egalitarianism, as well as prominence in the current literature on relational egalitarianism.

There are also likely to be many other possible ways in which relations of equality could be defined by a relationalist theory, which haven't articulated in the literature. Some are implied within the theories discussed here, through the use of terms such as recognition or care. However, as they have not yet been made central to any theory of egalitarian justice, they will not be considered as stand-alone theories for the purposes of this project.

one of the minimum adequacy requirements, in Chapter 4 I will suggest and evaluate an alternative candidate.

There are at least two different kinds of ways that the question “what kinds of relations are relations of equality?” can be understood and answered. I will describe these as the *enabling* and the *entailment* approaches to this question. The enabling approach focuses on what people need to be able to do in order to be rendered equal, and claims that relations of equality are precisely the kinds of relations that enable them to do those things. These kinds of answers to what it means to relate as equals do not characterize the relationships of equality directly, but instead describe the social effects that such relationships should have. The entailment approach, on the other hand, focuses on identifying what characteristics the relationships themselves must have in order for them to count as ones where the people involved relate as equals. Enabling and entailment approaches may manifest in a variety of ways, including some that are not explored here, but this basic categorization can help to clarify an important difference among the candidates I am examining in this chapter. I view Scheffler and Anderson as primarily presenting enabling approaches, while Lippert-Rasmussen and Schemmel present entailment approaches.

It is important to state now that I do not intend to argue that any viable relational egalitarian theory will put forward only one kind of relationship as what is meant by relations of equality. I intend to leave open the possibility of a pluralist account, both within relationalism and in the debate between relationalists and distributivists. My intention is instead to give grounds for setting aside those conceptions of relations of equality that are less plausible due to their inability meet the minimum requirements necessary. Additional viable alternatives may arise, and it is possible that combining the inadequate conceptions relayed here could serve to eliminate or at least mitigate the flaws that make them inadequate when examined separately.

Chapter 4 serves to put forward what I think is one such, more promising, alternative for to building to building a relational egalitarian theory of justice.

3.1. Samuel Scheffler: the Egalitarian Deliberative Constraint

The first theory that I will consider is the one proposed by Samuel Scheffler, developed over a series of articles and book chapters since 2003. Put briefly, this view proposes a constraint on social decisions (which Scheffler calls the *egalitarian deliberative constraint*), arguing that people relate as equals when their equally important interests exert equal influence on decisions that are being made.

Scheffler conceptualizes relational equality as primarily a moral value or normative ideal, which governs the relationships among members of society and shapes how they stand in relation to one another (Scheffler 2003, 21). At the core of this moral ideal is the idea that “there are some claims that people are entitled to make on one another simply by virtue of their status as persons” (Scheffler 2003, 22). As a result, relations between people “must be conducted on the basis of an assumption that everyone’s life is equally important, and that all members of a society have equal standing” (Scheffler 2003, 21), which means opposition to “oppression, to heritable hierarchies of social status, to ideas of caste, to class privilege and the rigid stratification of classes, and to the undemocratic distribution of power” (Scheffler 2003, 22). Scheffler also identifies a social and a political element of the ideal, which builds on its moral content. The social element holds “that a human society must be conceived of as a cooperative arrangement among equals, each of whom enjoys the same social standing” (Scheffler 2003, 22),

while the political element establishes that citizens are entitled to make claims “on one another by virtue of their status as citizens, without any need for a moralized account of the details of their particular circumstances” (Scheffler 2003, 22). Taken together, these three elements of the ideal of relational equality result in a conception of justice that requires the establishment of “a society whose members relate to one another on a footing of equality” (Scheffler 2015, 21).

In order to implement this ideal in political contexts, Scheffler argues that equality in political relations can be best understood by analogy to equality in close personal relationships such as a friendship or marriage. In a marriage between equals there is a “reciprocal commitment to treating one another with respect,” specifically as an agent with all the associated capacities (Scheffler 2015, 24).²⁷ This reciprocal commitment also means that neither holds more authority over the other, “and each sees the other as entitled to participate fully and equally in determining the future course and character of the relationship” (Scheffler 2015, 24). A relationship between equals is therefore characterized by reciprocity, mutual respect, and rights and responsibilities held by both agents. Most importantly, if it is a relationship of equality, each person’s “equally important interests- understood broadly to include the person’s needs, values, and preferences- should play an equally significant role in influencing decisions made within the context of the relationship” (Scheffler 2015, 25).

These characteristics in personal relationships results in the afore mentioned *egalitarian deliberative constraint*. Scheffler argues that a relationship between equals requires that both parties have the disposition to treat equally important interests of the other person as equally significant in decision making, and then for them to act on that disposition, so that “each of our equally important interests constrains our joint decisions to the same extent” (Scheffler 2015,

²⁷ These capacities include the fulfillment of the responsibilities assigned based on that status, and the ability to make claims on others based on that status (Scheffler 2015, 24).

25).²⁸ Standing in relations of equality, therefore, requires that “the parties have certain attitudes, motives, and dispositions with respect to one another” (Scheffler 2015, 31), including an investment in the relationship as one of equals and concern over how “their respective interests influence their joint decisions” (Scheffler 2015, 33). In order for these factors to successfully influence decision making, a “normally extensive mutual knowledge and... direct access to their own deliberation” is going to be required (Scheffler 2015, 33).

Based on this characterization of egalitarian personal relationship, Scheffler then builds an analogous version of the deliberative constraint that he thinks applies to political relations and is necessary for creating a society of equals (Scheffler 2015, 35).²⁹ He argues that a society based on egalitarian relations would be one in which all members accept the egalitarian deliberative constraint, have the disposition to apply it, and act on that disposition (Scheffler 2015, 35-36). If the egalitarian deliberative constraint is applied in this way, it will result in a society where the relationship between all members is “characterized by a reciprocal commitment on the part of each member to treat the equally important interests of every other member as exerting equal influence [and constraint] on social decisions” (Scheffler 2015, 36). This presents a practical ideal, concerned with “the kind of society the members want to construct and the way they want to relate to one another” (Scheffler 2015, 38).³⁰

²⁸ Scheffler does recognize that actually satisfying this constraint, and making decisions within it, is a complex task due to the way in which interests may interact, and the multiple possible solutions to any conflict or challenge that may be available (Scheffler 2015, 26).

²⁹ Scheffler is very careful to recognize the many ways in which the relations among members of a political society which are disanalogous to personal relationships. Such factors include the lack of face to face contact, and increased anonymity, among members of a society; the lack of individualized knowledge about the needs, preferences, and values of others as a result; the difficulties of enabling participation despite the scale of decision making and number of people involved; and the need to clearly delineate what is within the scope of political decision making (Scheffler 2015, 37). However, he still thinks that the analogy is useful for understanding relations of equality in the political context.

³⁰ Scheffler does pay some attention to questions of distribution, since one of the key kinds of social decisions that must be made within the egalitarian deliberative constraint is how society “structures the distribution of resources that are necessary for them to flourish” (Scheffler 2015, 38). However, the principles behind this distribution must

The egalitarian deliberative constraint is, in both incarnations, a constraint on how people in a relationship of some kind relate to one another, in order to make that relationship one of equality. This does not, however, provide a clear characterization of the relationship itself. Scheffler is careful to emphasize that “the deliberative constraint is only one dimension of the broader relational ideal, the ideal of a relationship among equals” (Scheffler 2015, 40), and gives some indication of what those other dimension might be when he says “the relational view cannot be spelled out without reference to other values,” such as reciprocity and respect (Scheffler 2015, 41). This leads Lippert-Rasmussen to think that Scheffler’s account at least gestures towards a pluralist view. Unfortunately, Scheffler does not go into further detail describing how such values should be incorporated into characterizing the relations among a society of equals, nor does he provide an explanation of the interaction between the deliberative constraint and those other values. As a result, it is unclear what exactly the full extent of the relational ideal entails for Scheffler, and what the resulting “relations of equality” should look like.

Lippert-Rasmussen has tried to identify exactly what relationendum is being used in Scheffler’s account, describing it as being “equal concern for each other’s interests” (Lippert-Rasmussen 2018, 25). Although this is an important aspect of relations of equality for Scheffler, I do not think it fully captures what it means to relate as equals on his account. I take Scheffler to be proposing an example of an enabling approach to characterizing the kinds of relations required by egalitarian justice, which is not concerned with describing the relations themselves. Instead, by virtue of being a *constraint*, the egalitarian deliberative constraint is the condition

be consistent with not only that constraint but also with the broader ideal of a relationship among equals (Scheffler 2015, 40).

that enables relations of equality to occur or develop.³¹ In short, relations of equality for Scheffler are those relationships that are enabled when everyone's equally important interests exert equal influence over collective decisions, as a result of everyone committing to giving equal weight to those equally important interests from their fellows.

3.1.1. Is Scheffler's Account Minimally Adequate?

With a summary of the account established, I am now going to test Scheffler's theory against the six requirements for a minimally adequate relational egalitarian theory of justice. This is difficult to do in any definitive way, as Scheffler's answer to the question of what it means to relate as equals is not as clearly developed as some of the others to be discussed later in this chapter. However, the egalitarian deliberative constraint gives enough of an indication of the relational ideal that some general determinations can be made. Scheffler's view is clearly egalitarian (satisfying the Egalitarian Requirement) and due to its nature as a constraint rather than a full description of the relations between equals, it can easily fulfill the Avoiding Problematic Perfectionism Requirement. I will not discuss those two criteria in depth, as I think my summary of the account should make clear how this is the case. However, Scheffler does run into varying degrees of trouble with the other four requirements.

I do want to emphasize again that, as has been mentioned, I do not take a theory failing one of these requirements to mean that it should be completely rejected. It is possible that such a flawed theory is the best that relational egalitarianism can produce. More importantly, a consistent failure of candidate accounts to fulfill all of these minimum adequacy conditions may

³¹ This is in contrast to identifying what must be enabled by relations of equality in order for them to count as such (which is the structure of Anderson's theory, outlined in Section 3.4.) or what relations of equality entail (like Lippert-Rasmussen's account in 3.2., and Schemmel's in 3.3.).

indicate something important about the problems of relational egalitarianism in general as a theory of egalitarian justice. However, such a failure does suggest that a better theory should be sought if one wants to continue pursuing the relational approach to egalitarianism.

(1) The Justice Requirement: Is Scheffler's account clearly an account of justice?³²

Determining whether or not Scheffler's account fulfills this first requirement is rather difficult, particularly because the egalitarian deliberative constraint is initially proposed as a constraint for egalitarian personal relationships between individuals, such as a marriage or friendship (Scheffler 2015, 38-39). This poses a problem because, as was discussed in Chapter 2, justice is a matter of institutions. Although Scheffler does provide a fairly thorough extrapolation of this constraint into the political context, and addresses specific concerns about the move from the personal to the political, the strategy of starting from the personal casts doubt on whether he is really talking about a constraint on justice or a more general normative requirement.

This account does succeed in not obviously presenting principles dictating well-being, ethical obligations, or other elements outside of the acceptable realm of the political. On the other hand, the constraint also is not obviously restricted to the institutions that are the concern of justice. The theory Scheffler presents could easily be expanded to give prescriptions outside of what is generally seen as the purview of justice as a political concept, depending on how the egalitarian deliberative constraint is deployed. As a result, it seems to me that Scheffler passes this requirement, but that any application or expansion of his theory may risk violating it.

³² The numbering of these requirements corresponds to the order of the requirements in Chapter 2. As a result, the numbers of the requirements successfully fulfilled (2 and 3) are skipped. The same approach is taken in the subsequent sections of this chapter when discussing specific adequacy requirements.

(4) The Real World Requirement: Is Scheffler's account able to address real world egalitarian movements?

The next requirement that Scheffler's account struggles with is another difficult one to evaluate, particularly because Scheffler does not explicitly talk about many real world social issues in the articles where he outlines the theory. This in itself is to the detriment of the theory as he presents it, although it doesn't by itself count as a failure of the Real World Requirement. When a theory does not explicitly address such issues, the question becomes whether the egalitarian deliberative constraint is capable of informing and being informed by the particular issues and cases that real world social justice movements with valid claims consider instances of inequality and injustice. Lippert-Rasmussen seems to express doubt that Scheffler's account can do so, as he argues that there are cases which fail to fulfill the egalitarian deliberative constraint but where the participants still relate to one another as equals (Lippert- Rasmussen, 91). Although I am not sure I agree with the examples Lippert-Rasmussen gives to characterize when this might be the case (I would argue that in these cases those involved are not relating as equals), I do think that his argument helps reveal how weak Scheffler's theory is when it comes to real world cases.³³

In particular, it is not made clear what it means for interests to be "equally important" according to Scheffler. What exactly this phrase means will shape whether or not the egalitarian deliberative constraint considers any particular cases unjust or just. It is possible that Scheffler's account could succeed in fulfilling this requirement by informing and explaining the particular issues and cases that concern social justice movements, since it is true that institutions are often considered unjust because they lack equal consideration of and influence from the interests of

³³For example, he argues that "two conflicting parties can relate as equals even if they do not 'have a reciprocal commitment to treating one another with respect', e.g. they find it permissible that on some occasions they are not treated with respect by the other and permissible that they themselves do not treat the opposing party with respect" (Lippert-Rasmussen 2018, 91).

certain people or groups in their decision making. However, the theory as it is presented by Scheffler is insufficient to explain most cases because of the ambiguity in that concept of importance.

For an example, think of someone who values religious community, both for themselves and others, and as a result one of their important interests is that the government provide support for building religious community and sites of worship. Imagine a second person who values secular education, and has an interest in the government ensuring that high quality public education is available. It is unclear whether, under Scheffler's account, these are equally important interests that must be given equal weight in political decision making.

The same kind of issue can also arise between groups. Imagine a second case in which a government wants to build a pipeline carrying natural gas through traditional hunting grounds of a particular indigenous group, which are still used as a significant source of food and cultural connection. The pipeline will provide significant economic benefits to the local community, both indigenous and not, but its construction will destroy the ecosystem those hunting practices depend on. The relevant government bodies consult the interested parties, but determine that the economic benefits to the area such as job creation are more important than the cultural interests of the indigenous group. In this case, the egalitarian deliberative constraint gives little guidance for determining whether or not the "equally important" interests of the two groups have been considered to an equal extent in this context. As a result of these and similar cases, it seems that it remains an open question whether Scheffler's theory could fulfill the Real World Requirement.

(5) The Dialectic Requirement: Is Scheffler's account dialectically robust?

Since his critique of luck egalitarianism was relatively early in the development of literature on relational egalitarianism, it is difficult to judge whether he provides adequate engagement with the broader relationalist literature. He does explicitly discuss the earlier work of both Anderson and Wolff, two of the other prominent anti-distributivist theories at the time. However, he fails at the other dimension of this requirement. An adequate theory must not only be able to respond to critiques but must also not be vulnerable to its own critiques of other theories. Scheffler presents a theory that is vulnerable to some of the same kinds of critiques that he levels against luck egalitarianism.

Similar to Anderson, Scheffler argues that in order to determine what is or is not the result of someone's choices, luck egalitarianism has to be more invasive than is acceptable for institutions to be (Scheffler 2003, 21). However, it seems as though a similar level of scrutiny would be necessary in order to determine what other peoples' interests are, which would be a necessary step in ensuring their equally important interests are taken into consideration in political deliberations. In addition, parameters of "equally important interests" has a degree of ambiguity that is comparable to the ambiguity of the line between luck and choice, which Scheffler critiques in luck egalitarianism (Scheffler 2003, 18). Since Scheffler's account shows some of the same key flaws that lead him to reject luck egalitarianism, it seems that the account is weak with regard to its dialectic robustness, even if it doesn't outright fail this requirement.

(6) The Relational Requirement: Is Scheffler's account irreducibly relational?

It is clear that Scheffler's account is relational in one sense. His use of interpersonal relationships such as marriage and friendship as the analogical model for the relations of equality in a just society of equals ensures that the theory fulfills this requirement. The egalitarian deliberative

constraint is first and foremost a constraint on how individuals relate to one another, specifically when they deliberate together. In spite of that, problems with regard to this requirement arise because the kinds of close interpersonal relations that Scheffler is focusing on are generally thought to generate special obligations to the particular people who one relates to as a friend or spouse. These kinds of special obligations require partiality towards the loved one, and create unequal relations to other people who become involved, since one is likely and even expected to prioritize a loved one over associates of other kinds. Since Scheffler's model focuses on two-place relations, rather than the whole complex system of relations which egalitarians must consider, he does not seem to have the resources within the account to deal with these cases, and it is not clear that his account is relational in the robust sense that most relational egalitarians intend. It is irreducibly relational, but superficially so.

Other theorists are more skeptical of Scheffler's relationalist credentials. Daniel Putnam argues that the view is not irreducibly relational, because he thinks "it is unclear in what positive sense the EDC concern interpersonal relationships or the ways that people relate to one another" (Putnam 2016, 37). He further states that Scheffler's account can be expressed in terms of an equal distribution (Putnam 2016, 28). Similarly, Lippert-Rasmussen argues that although the egalitarian deliberative constraint cannot be reduced to deliberative terms, it is not a constraint on social relations, and therefore not relational in the relevant sense (Lippert-Rasmussen 2018, 204). He suggests instead that Scheffler's account is an instance of a third kind of egalitarian theory, what he calls *dispositional egalitarianism*.

I disagree with these characterizations, which I think are a result of an implicit but exclusive focus on the entailment approach to characterizing what it means to relate as equals. Since I take the egalitarian deliberative constraint to be an enabling condition on relations of

equality, because these are the kinds of relationship that are built through the deliberations it constrains, I think the theory retains its irreducibly relational character even though the constraint does not by itself entail a certain kind of social relation. However, despite my defense of the relationality of Scheffler's account, I do think the objections raised by Putnam and Lippert-Rasmussen in combination with the concerns I expressed about the robustness of the relational element, casts enough doubt that it is difficult to say whether Scheffler really fulfills this final requirement.

Although Scheffler's account fulfills two of the requirements, it falls short of at least two (the Real World Requirement and the Dialectical Requirement), with two more being difficult to determine (the Justice Requirement and the Relational Requirement). Although it doesn't obviously fail any of them, these flaws still indicate a better version of the relationalist theory is needed. It is worth noting that both the strengths and weaknesses of the view come from its ambiguity, and some of the problems I have identified could be addressed by adding further detail and clarity to the account, specifically as an account of relations of equality. As a result, it seems desirable to find an account that does provide such detail, while remaining egalitarian and without becoming problematically perfectionist.

3.2. Kasper Lippert-Rasmussen: A Pluralist Relational Egalitarianism

The second theory that I am going to test was presented by Kasper Lippert-Rasmussen in his 2018 book *Relational Egalitarianism: Living as Equals*. As I have mentioned previously (see Section 1.4.), Lippert-Rasmussen takes a mixed approach to egalitarianism, incorporating both

distributivist and relationalist elements to create what he calls a “luckist, partially complete-lives version of relational egalitarianism” (Lippert-Rasmussen 2018, 19-20). This is feasible because, he argues, distributive luck egalitarianism, relationalism, and what he calls dispositional egalitarianism are both “consistent and distinct” (Lippert-Rasmussen 2018, 19).

It may seem odd to be discussing a mixed, pluralist account like this one when trying to determine the strongest foundation for a relationalist theory. However, Lippert-Rasmussen is one of the first theorists to explicitly ask the question, “what exactly is it to relate as equals?” (Lippert-Rasmussen 2018, 61), and then provide a detailed answer. As such, examining his answer gives important insight into how the idea of relating as equals in the way necessary for egalitarian justice has been developing in political philosophy.

Lippert-Rasmussen establishes at least three components that go into determining the content of what it means to relate as equals. The first is the dimension along which the people in question are relating, because he argues that “relating as equals” always refers to relating along some specified dimension(s). These include at least the moral, epistemic, social, aesthetic, and empirical dimensions, although there may be more (Lippert-Rasmussen 2018, 63-68). Second, like with distributivist theories, a relationalist theory can be either outcome or luck based (Lippert-Rasmussen 2018, 7). Finally, the relationendum of the theory needs to be identified, a parallel to identifying the currency of distributive theories (Lippert-Rasmussen 2018, 7). He lays out several different kinds of “relationendum” that have been suggested by other relationalists, which include but are not limited to: expressing equal respect, equal recognition, equal concern for each other’s interests, and freedom understood as non-domination (Lippert-Rasmussen 2018, 70). Once the three components are developed, a theory should have a characterization of what the relationships among equals required by relational egalitarianism actually entail.

In his own positive account, Lippert-Rasmussen seems to take a multidimensional approach, although it is not clear whether he thinks certain dimensions are more important than others for the political question of egalitarian justice. He is explicit that his positive account is luckist, however, he is less specific about what relationendum he wants to use. A great deal of what is left vague in this account is likely an intentional result of him wanting to remain pluralistic and context based, but it does make it hard to identify a clear answer from him on what the relations required for justice entail.

Despite this vagueness, Lippert-Rasmussen does provide a clear formula for the general principle of what it means to relate as equals:

“X and Y relate as equals if, and only if, (1) X and Y treat one another as equals; (2) X and Y regard one another as equals” (Lippert-Rasmussen 2018, 71).

Each of the two components, treating and regarding, is an independently necessary condition, and only the two together are sufficient for relating as equals (Lippert-Rasmussen 2018, 71). He provides an in depth analysis of what each of those two components involves, which I will only briefly outline here.

There are several key aspects of what it means to treat people as equals that Lippert-Rasmussen focuses on. One is that treating someone as an equal requires a causal conditions, so that affecting each other’s situation in a relevant way is possible (Lippert-Rasmussen 2018, 73). With that causal condition in place, there are then five different conceptions of “treating as ___” that could be used: a normative, motivational, communicative, expressive, and presuppositional (Lippert-Rasmussen 2018, 74-79). A relational egalitarian may be employing any or all of these

notions when they talk about “treating as equal” (Lippert-Rasmussen 2018, 80), and each can occur along any of the five dimensions mentioned earlier.³⁴

However, relating as equals also requires being equals. In the most formal sense, “X and Y are equals if, and only if, the same basic normative rules and axiological principles apply to them” (Lippert-Rasmussen 2018, 80). However, Lippert-Rasmussen thinks that an additional caveat needs to be added, where (for example) on the moral dimension “X and Y are moral equals if, and only if, the same basic normative rules and axiological principles apply to them and if, in accordance with those rules and principles, X and Y are equally important in whatever respects are fundamentally morally significant (other than the fact that people relate to one another as equals)” (Lippert-Rasmussen 2018, 81). The structure of this new principle can then be tailored to whichever dimension the people in question are relating along, while always retaining the caveat that the people in question must be equally important in the relevant, significant respect according to the rules and principles in question. This means that what being equals means is indexed to the dimension along which people are relating, so that for instance two people could be equal with regards to the moral dimension but not the social dimension.

It is worth noting that at this point, the account seems to be very externalist. It is unclear whether or not anyone needs to actually acknowledge that they are under these shared rules and axiological principles, let alone going the step further to internalize them consciously into their beliefs and decision making processes. However, *treating* one another as equals is only half of what it means to relate as equals. Just as important is the requirement to *regard* the person as an equal, which does require internalization. Regarding as equals requires both the implicit and explicit belief that the people in question are equals, them actually being equals, and certain non-

³⁴ He notes that while Anderson uses a primarily expressivist notion, Scheffler uses a motivational notion (Lippert-Rasmussen 2018, 80).

cognitive attitudes and responses to them which can also be either implicit or explicit (Lippert-Rasmussen 2018, 85). There is not, in contrast to treating as equals, a causal condition. One can have this attitude and belief without ever affecting the lives of the people in question (Lippert-Rasmussen 2018, 87).

In short, when one treats someone as an equal, regards them as an equal, and is an equal, then they relate as equals. However, there is an important difference between “describing the ideal of relating as equals” and “describing the ideal way of relating as equals” (Lippert-Rasmussen 2018,87). In tackling the first task, Lippert-Rasmussen identifies the relational ideal of justice as being that “a situation is just only if social relations have certain specific, desirable features” (Lippert-Rasmussen 2018, 5). Trying to tackle the second task leads to the introduction of values other than that ideal, which may have nothing to do with social relations or even equality (Lippert-Rasmussen 2018, 90-91). This is why he argues for a pluralistic relational egalitarianism, that recognizes relational equality “is far from everything that matters” (Lippert-Rasmussen 2018, 88). Holding to the relational ideal is what makes a theory a relational egalitarian theory of justice, but it is not all that an iteration of relational egalitarianism may value.

His pluralist approach leads him to argue for what he calls he calls *ecumenical luck egalitarianism*, which states that:

“It is unjust if, avoidably, any of the following three conditions are satisfied: (1) some people are worse off than others (through no responsibility of their own; (2) some people do not relate to each other as equals (through no responsibility of their own); or (3) some people, who are suitably related, are not disposed to avoid some people being worse off than others (through no

responsibility of their own) or to relate to others as equals (through no responsibility of their own)” (Lippert-Rasmussen 2018, 206).³⁵

This account does include relating as equals as an important way in which equality can be relevant to justice, but it is only a part of the account, and the relation element is not more fundamental to justice than the others. Furthermore, Lippert-Rasmussen tentatively concedes that although formally relational egalitarianism is not reducible to distributive egalitarianism, it is reducible in a substantive sense (Lippert-Rasmussen 2018, 210). This seems to reinforce the compatibility of the elements of his view, but it also raises some doubts about the view’s credentials as a relational egalitarian view.

On the other hand, he does name his view a version of relational egalitarianism (Lippert-Rasmussen 2018, 20), and spends considerable time elaborating in detail what it means to relate as equals. This makes his view at the very least an important contribution to discussions of relationalism. This also makes the view difficult to evaluate in the context of this dissertation, because he does not provide one, single, easy-to-state principle of what it means to relate as equals. Instead, he views relating as equals through a contextualist lens, where the ideal way to relate as equals depends on the dimension the people involved are relating along, what notion of “treating as equals” they are using, what conception of equality results from these factors, the cognitive and non-cognitive elements of regarding someone as an equal, and both explicit and implicit beliefs. The closest thing one can find to his answer to “what kinds of relations are relations of equality?” appears to be that they are those that entail both regarding and treating people as equals (whatever regarding, treating, and equal mean along a particular dimension).

³⁵ The third component, which he calls dispositional egalitarianism, he extrapolates from Scheffler’s egalitarian distributive constraint. This he describes as the position that “it is unjust if some people (who are suitably related) are not disposed to relate to others in a way that respects the deliberative constraint.” (Lippert-Rasmussen 2018, 204).

3.2.1. Is Lippert-Rasmussen's Account Minimally Adequate?

It is clear that, like Scheffler, Lippert-Rasmussen's account meets the Egalitarian Requirement, as he makes clear that the whole justification for the ideal of relational equality is "we are one another's moral equals and in relating as equals we honour that fact" (Lippert-Rasmussen 2018, 170). Again, like Scheffler, it also succeeds at the Avoiding Problematic Perfectionism Requirement, due to its pluralism and the abstractness that comes from its contextualism. In addition, he engages extensively with existing literature, fulfill the Dialectic Requirement where Scheffler fall short. However, some of the other three requirements pose significant problems for this account.

(1) The Justice Requirement: Is Lippert-Rasmussen's account clearly an account of justice?

The first requirement poses a problem of this theory because of the many dimensions along which Lippert-Rasmussen considers what it means to relate as equals. There is definitely an element of his theory that is an account of justice, in the broadly institutional sense that I have described. However, many of the dimensions that he discusses go beyond what most contemporary political philosophers would view as the purview of political institutions. For example, people failing to treating eachother as aesthetic equals seems to an issue outside of what most would consider it appropriate for political institutions to remedy (assuming such treatment does not also impact dimensions more traditionally considered the concern of justice, such as political and economic inequality). It is unclear whether he means to employ in his account of justice all of the dimensions he mentions, or not. To reinforce these doubts, when explicitly discussing the site of relational egalitarian justice he argues for an individualist account as opposed to an institutionalist account (Lippert-Rasmussen 2018, 149). Although I have tried to leave the question of the site of justice open (see Section 1.3.2), in combination

with the broad range of dimensions along which he discusses treating others as equals, this individualist approach makes it unlikely whether his theory fulfills the justice requirement as I have stated it.

(4) The Real World Requirement: Is Lippert-Rasmussen's account able to address real world egalitarian movements?

The extensive pluralism of this account, both as far as the dimensions along which it is concerned about relating as equals and the focus on both regarding and treating, makes it very likely that the theory could inform and be informed by a wide variety real world social movements. However, Lippert-Rasmussen doesn't seem to actually pay much attention to such real world claims. He even considers the objection to his theory that one could view it as "misconceived" on the basis of failing to pay attention to "the concerns of real-life egalitarians" (Lippert-Rasmussen 2018, 174). However, he does so only to reject the idea that such attention could be a requirement, at least in the form that it appears in both Anderson and Schemmel's work (Lippert-Rasmussen 2018, 174; quoting Anderson 1999, 312 and Schemmel 2012, 134). He argues that at the very least, if attention must be paid to "the concerns of real-life people... it should be attentive to the concerns of egalitarians and anti-egalitarians alike" (Lippert-Rasmussen 2018, 176). It is not clear to me that this is the case, as egalitarian political philosophers do not claim to be explaining the theoretical background to the issues and movements of real world anti-egalitarians (while they do seem to be doing so for real-world egalitarians). Regardless, what is important here is that Lippert-Rasmussen seems to be acknowledging that his theory is not informed by real world social justice movements, and seems to have little interest in informing them either. This shows that even if his theory has the potential fulfill this requirement, as it currently stands it does not.

(6) The Relational Requirement: Is Lippert-Rasmussen's account irreducibly relational?

This is the requirement that Lippert-Rasmussen's theory very clearly fails. In discussing what he calls the reductionist challenge to relational egalitarianism, he concedes that there is no substantive difference between the distributive and relational accounts, even if there is a formal difference (Lippert-Rasmussen 2018, 201). He argues that there is little or nothing that is morally relevant that is not extensionally equivalent between equal social relations and the goods that social relation involves that make it what it is (Lippert-Rasmussen 2018, 200). Although he seems willing to maintain the formal distinction between the relational and distributive elements of his ecumenical luck egalitarianism, by conceding to the reductionist challenge he shows that the relational aspect of his pluralist account fails to be irreducibly relational, and therefore fails this requirement. As a result, Schemmel specifically targets Lippert-Rasmussen as someone that "risks missing exactly what that distinctive contribution [of relational egalitarian demands] might be" (Schemmel 2021, 147).

Although Lippert Rasmussen's pluralist account does succeed at three of the requirements, it is seriously flawed when it comes to both the Justice Requirement and the Relational Requirement, and it shows some weakness with regard to its ability to fulfill the Real World Requirement. It is true that many of these failures are the result of him fairly explicitly rejecting the criteria for judging a theory of justice that they represent, which challenges the very framework I am using here. A significant component of that rejection is a result of the pluralism of his ecumenical account. As such, some of these problems may be the result of testing a mixed theory against a set of minimum adequacy requirements for a relationalist theory. However, the theory's inability

to succeed in fulfilling the Justice Requirement should still be troubling, as that is a requirement for any egalitarian theory of justice.

For the purposes of this project, it will suffice to say that Lippert-Rasmussen's account of relations of equality does not fulfill the minimum adequacy requirements for a relational egalitarian theory of justice, and thus there is still a need for an alternative account of what it means to relate as equals. That alternative will need to be much more obviously and irreducibly relational, while also being a clear matter of justice in an institutional sense. However, in the process it must maintain the egalitarian character and the avoidance of problematic perfectionism found in both Scheffler and Lippert-Rasmussen.

3.3. Christian Schemmel: Liberal Non-Domination and Social Status Norms

The third theory I will examine is Christian Schemmel's recent contribution, which argues for an expressivist account of relational egalitarianism. Within that approach, Schemmel proposes that the most important relations for achieving relational egalitarian justice are those of liberal non-domination, while attention must also be paid to esteem based norms of social status, particularly those that harm self-respect and deprive people of social opportunities (Schemmel 2021, 3-4). The result is a pluralist, entailment view of relations of equality.

Schemmel describes his approach to relational egalitarianism as expressivist. The term "expressivism" has been used in several different contexts in philosophy. In the most general sense, expressivist theory involves evaluating actions "in terms of how well they express certain intentions, attitudes or other mental states" (Anderson and Pildes 2000, 1508). This theoretical

approach has often been used in the context of philosophy of law and punishment, but can also be translated into political philosophy, arguing that the actions of the state can be evaluated in terms of how they express those kinds of intentions and attitudes (Voigt 2018, 442).

Schemmel's account is an instance of evaluating state action in this way. He takes expressivism to be a perspective which centers the idea that how "social and political institutions treat individuals and groups is of irreducible importance to justice" (Schemmel 2021, 13). Such treatment expresses the attitudes and intentions the agent both consciously holds and that the subject could reasonably understand as being held by the agent. What is expressed in turn constitutes the meaning of the treatment (Schemmel 2021, 45). Although that meaning is present regardless of the outcome, it is particularly pertinent "where the treatment gives rise to, or shores up, power and status hierarchies between different individuals and groups" (Schemmel 2021, 13).

Expressivist considerations are particularly important to justice because they identify the meaning behind the ways "social and political institutions treat individuals in the process of structuring cooperation, and distributing its goods and bads" (Schemmel 2021, 53). This in turn reflects whether or not institutions succeed in treating people as equals. In order for institutions to treat people as equals, and in the process show an attitude that acknowledges basic moral equality, those institutions must be structured so people "encounter each other in relations of appropriate social and political equality" (Schemmel 2021, 56).

Part of the reason that Schemmel takes the expressivist approach is because he believes it is better able show that there are some wrongs whose "gravity does not depend on the material importance of the goods, or opportunities, which individuals might thereby be denied" (Schemmel 2021, 21), and can explain why certain actions by institutions are relevant to justice

regardless of the distributive effects (Schemmel 2021, 28).³⁶ He argues that the relational egalitarian should be concerned with the actions of institutions that demonstrate attitudes of disregard or disrespect, from “open hostility to mere neglect,” because such attitudes reflect how “unjustly treated persons are assigned differential moral status by institutions” (Schemmel 2021, 39).

However, Schemmel is also careful to caution that expressivism by itself doesn’t necessarily imply relationalism (Schemmel 2021, 55). It must be supplemented with both the assumption of basic moral equality and the inference from that assumption to the requirement that something be made equal, specifically the “principle that, therefore, they have to be treated with equal respect” (Schemmel 2021, 55). When those core elements of egalitarianism are added to the expressivist approach, justice is taken to require that institutions treat people as equals in a way that expresses their basic moral equality, and Schemmel argues that “a central requirement will be to make sure that they encounter *each other* in relations of appropriate social and political equality” (Schemmel 2021, 56, emphasis in the original). The focus of the rest of the theory is on what those encounters among individuals need to look like in order for the expressivist requirements of state action to be considered fulfilled.

To sum up the account so far, then, Schemmel uses the expressivist perspective in order to clarify what makes relationalism different from distributivism. He also uses it to get at what he takes to be an important way to frame justice in the political sense that egalitarians are concerned with, specifically as being a matter of how institutions treat their subjects, and the attitudes and

³⁶ Schemmel contrasts this kind of expressivist theory with what he (drawing on Thomas Pogge) refers to as a “‘purely recipient oriented’ conception of justice” (Schemmel 2021, 22). He argues that the main problem with distributivist theories that those theories focus on “what individuals are entitled to get, rather than how social and political institutions are to treat those to whom they apply” (Schemmel 2021, 22), and as a result they miss the moral significance of the acts of those institutions (Schemmel 2021, 24) and coming up with the wrong solutions (Schemmel 2021, 27).

therefore meanings that treatment expresses. Part of that treatment will involve how institutions help structure the interactions between individuals, rather than just how institutions treat each individual directly.

Although he thinks that it provides support for the relationalist approach, he recognizes that the expressivist perspective alone does not answer the question that I am concerned with in this dissertation: what kinds of relations are those that are required by justice? In order to link the general expressivist concern with how institutions treat individuals to the content of relational egalitarian commitments, he turns to elements of Phillip Pettit's account of freedom as non-domination. Specifically, he argues that to be just "institutions must honor individuals' fundamentally equal moral worth, and thus treat those under their power as equals" and "they do this by honouring their equal status as free persons, which requires respecting and promoting their equal freedom to choose, which, in turn, requires entrenching these freedoms against others' powers" by ensuring non-domination (Schemmel 2021, 88). While he draws inspiration from Pettit, he is very careful to distinguish his view of what non-domination entails from Pettit's account, filling in what is meant by relations of equality using what he calls using "a substantive conception of non-domination" based in background ideas from liberal theory about personhood and society (Schemmel 2021, 14).³⁷

Specifically, Schemmel argues that the notion of non-domination needs to be supported by background conceptions of "individuals as free and equal members of society, endowed with certain moral powers; the idea of society as a scheme of cooperation; and the idea of a just

³⁷ Schemmel critiques the neo-republican view of non-domination as being too limited and unable to account for certain injustices (Schemmel 2021, 79-80), too restrictive to allow for the kind of division of labor needed in complex societies (Schemmel 2021, 85-86), and insufficient in both the range and intensity of the protections it can provide (Schemmel 2021, 92). He also raises concerns about perfectionism of views that try to maximize non-domination alone (Schemmel 2021, 113-114). For an attempt to provide a relational egalitarian theory based in neorepublican non-domination, see Garrau and Laborde 2015.

society as a fair scheme of such cooperation” (Schemmel 2021, 57).³⁸ This background provides support for the justice relevance of egalitarian relations in general and non-domination in particular, based explicitly on the foundational ideas of liberalism. Schemmel argues that a liberal views the purpose of social justice as being “to set up and regulate social cooperation so as to enable the development and exercise of everybody’s moral powers, and especially of the second moral power of developing, pursuing, and revising one’s own conception of the good,” and doing so “express[es] proper respect for its participants” (Schemmel 2021, 60). To form an egalitarian theory based on this view, the relationalist needs to identify what relations serve this purpose.

Schemmel argues that establishing relations of non-domination are the most urgent requirement. He defines domination as “subjection to arbitrary power” (Schemmel 2021, 63), where arbitrary power involves “interference [that] is not subject to suitable direction, checks, or control” and ranges “over choices that are of some importance for the life of the chooser; its exercise must be able to affect her negatively to a significant extent” (Schemmel 2021, 64). Although he draws the centrality of concern with domination from neorepublicans like Phillip Pettit, he argues again against restricting the concern of social justice to maximizing non-domination (Schemmel 2021, 111-114). Instead, the liberal conception of non-domination focuses on eliminating arbitrary power specifically over interests that are directly connected to those background ideas liberals hold about the nature of human beings and society (Schemmel 2021, 74). The more fundamental to a person’s “moral powers and the idea of fair cooperation” an interest is, the more important it is to ensure it is not subject to domination, and the more

³⁸ The moral powers in question are “an effective sense of justice, according to which individuals are able to identify, and act with due regard to, others’ justified claims arising out of social cooperation” and “the capacity to develop, pursue, and revise a conception of the good” (Schemmel 2021, 59-60).

intensely it must be protected (Schemmel 2021, 101). However, Schemmel does note that other factors, such as the resources that would need to be spent on such protection, the choices and relationships such protection may interfere with, and the problematic judgments about personal deficiencies that may be involved, can all be weighed against the requirements of non-domination (Schemmel 2021, 103-109).

Furthermore, an asymmetric power relation does not necessarily result in domination. So long as either the person with greater power has to “honour the claims of justice of the less powerful,” constraints are present to ensure “she has to take the other party’s prima facie relevant claims of justice arising out of social cooperation into account,” or the procedure granting the power took into account those relevant claims and “is repeatable and revisable,” then the relation can avoid being one of domination (Schemmel 2021, 74). Under such conditions, although the power is asymmetrical, it is not arbitrary. Schemmel is careful to emphasize the importance of allowing for some just asymmetric power relations, since he argues that these will be important for social cooperation (Schemmel 2021, 62).

He also argues that liberal domination requires an agent as the dominator in order for the wrong of domination to be present. As a result, he argues that structural domination, understood as “a relation that need not hold between individual agents,” is an incoherent concept (Schemmel 2021, 94). This is because “the special force of the domination complaint ultimately rests on the inequality of standing between such agents that domination expresses,” which can’t be present between an individual and a structure (Schemmel 2021, 95). Schemmel argues that social structures, by their very nature, always have asymmetrical power over people (Schemmel 2021, 99), and so talking about such structures dominating people is to misunderstand both the nature of institutions and of domination. Although institutions and social structures can contribute to or

constitute dominatory relations, they cannot take on the role of dominator (Schemmel 2021, 95), because “giving up on the agency requirement would change the nature and significance of the ‘asymmetry’-condition beyond recognition” (Schemmel 2021, 99). An agent, whether an individual or members of a group agent, has to be involved in order for the wrong that comes from domination to occur (Schemmel 2021, 100). He does recognize that domination is a structural phenomenon and countering it “must always have a structural target” (Schemmel 2021, 120). Despite this, he insists it is never the structure itself that does the dominating, but rather agents within the structure.

An initial answer to the question of what relations are required for egalitarian justice on Schemmel’s account: relations of non-domination. Institutions will express the appropriate attitudes towards their citizens when, through both legal efforts and attention to informal structures and social norms, they ensure non-domination, limited by focusing on “the core background conceptions underlying liberal non-domination” in order to avoid perfectionism (Schemmel 2021, 123). But this initial answer is not all there is to relating as equals. Although Schemmel focuses on domination as the most urgent concern for relational egalitarian justice, he does recognize that it does not exhaust the kinds of relations that are of concern (Schemmel 2021, 78). Domination is a problem for justice because it results from an “insufficiently constrained power inequality” (Schemmel 2021, 127), leading to problems of hierarchy and subordination that violate basic moral equality, freedom, and social cooperation. However, there are clearly other kinds of relations besides domination which can cause such problems. As a result, a relationalist theory of justice should be able to account for cases where institutions treat people unequally in harmful ways but domination is not at stake (Schemmel 2021, 128-129).

To this end, Schemmel supplements the focus on non-domination with an “account of esteem based norms of social status,” particularly norms that are inegalitarian and enable domination, harm self-respect, and deprive individuals of important social opportunities (Schemmel 2021, 15-16). Although he recognizes that differential esteem is “a necessary fact of social life” stemming from valuing some things more than others (Schemmel 2021, 164), he argues that when esteem judgments are tied to norms about social status that create and reinforce hierarchies they become the subjects of justice assessment (Schemmel 2021, 165). He is careful not to “endorse a positive requirement of equality of esteem,” in order to once again avoid perfectionism (Schemmel 2021, 174). However, he does think that by focusing on the possible negative effects on individuals, especially those tied to the background ideas of liberalism, requirements of justice governing social status norms can be identified (Schemmel 2021, 174).

Obviously, when status norms lead to domination they are unjust, even if they are not themselves norms of domination (Schemmel 2021, 175). However, such norms are also unjust when they endanger self-respect and self-esteem (Schemmel 2021, 179).³⁹ This is because self-esteem and self-respect are directly connected to the development of the two moral powers liberals see as crucial to personhood and autonomy, giving liberals a good reason to protect them (within certain limits) as a matter of justice (Schemmel 2021, 180). Although he thinks some inegalitarian social norms must be allowed, they can’t be “so dominant that, as a matter of fact, they crowd out other opportunities to acquire social esteem” (185). In addition, a just egalitarian society must provide a kind of upbringing and education that ensures access to “the resources people need to arrive at correct convictions of their own worth, and to keep them robustly, even

³⁹ Schemmel defines self-respect as the moral “conviction that one is a moral agent subject to the same basic moral demands as all other agents, and worthy of being accorded a set of rights that are equal to those of others” and self-esteem as “the conviction that one is capable of developing, and carrying out, on the basis of one’s talents and capacities, projects and activities that have value, and thus are worth carrying out” (Schemmel 2021, 179).

under adversity” (Schemmel 2021, 184). In order to treat people in ways that express egalitarian attitudes, institutions must provide the necessary resources and programs to foster that kind of upbringing and education, to help develop relations among people that mitigate (or even eliminate) these harmful social norms, .

Status norms are also a concern for justice when they structure social interactions in a way that leads to a loss of opportunities for certain people, specifically when they “deprive individuals of opportunities to which they have an independently grounded claim of justice” through means that are unjust (Schemmel 2021, 188). The means of such deprivation are unjust when they are tied to a “pervasive, collective esteem norm” that excludes people through a “coordinate process” that also enlists third parties to corroborate the exclusion (Schemmel 2021, 189), and in the process expresses “a collective, objectionable inegalitarian attitude” (Schemmel 2021, 190). This is unjust because the inegalitarian content of the social norm judging someone inferior is enforced through a “self-sustaining collective mechanism” in order to produce unequal disadvantages in opportunities (Schemmel 2021, 190). The importance of such opportunity loses to justice will vary according to the importance of the opportunity, and they can be traded off against other requirements of justice, but they are a kind of relation to which relationalists must pay attention (Schemmel 2021, 192). Here too, how institutions counteract such opportunity loses and the social norms that cause them will determine whether they are treating people in ways that express the appropriate attitudes towards basic moral equals.

In summary, then, Schemmel’s answer to the question of what kinds of relations egalitarian justice should be concerned with include both relations of domination (understood in liberal terms) and those relations that stem from and create certain widespread, harmful social norms tied to hierarchies and subordination. The expressivism of the account comes from how

institutions treat individuals and groups, facilitating or stymying people's ability encounter each other in the appropriately equal relations. For Schemmel, relations of equality understood as non-domination and the avoidance of harmful status norms are relevant to justice because of the ways in which they exemplify such equal treatment. He spends the bulk of the theory characterizing the relations themselves, teasing out the details of how people relate to one another justly and unjustly. This results in a clear instance of what I have called an entailment approach.

3.3.1. Is Schemmel's Account Minimally Adequate?

Based on this summary of Schemmel's theory, the next step is to see how this account holds up against the six minimum adequacy requirements. Schemmel's account is relatively successful, in ways the first two theories were not. He builds on widely accepted ideas about what kinds of relations are unequal (domination and hierarchies of esteem), providing in depth elaboration of their relevance to egalitarian justice through careful attention to liberal ideals while not reducing the emphasis on relationships. As a result, the theory fulfills the Justice Requirement, the Egalitarian Requirement, the Avoiding Problematic Perfectionism Requirement, and the Relational Requirement. Schemmel also demonstrates a robust engagement with the existing literature, and is able to pre-emptively address many of the objections that are likely to be levelled against his theory from both within and outside of relationalism, so the Dialectic Requirement does not seem to be a concern. The remaining requirement does, however, seem to present a weakness in his account, which I will now discuss in more depth.

(4) The Real World Requirement: Is Schemmel's account able to address real world egalitarian movements?

Initially, it seems like Schemmel fulfills this requirement as easily as the others. Throughout Schemmel's account, there are multiple mentions of real world social justice issues, and the final three chapters are dedicated to applying the theory to issues with implications for real world calls for equality and justice, particularly in politics and health care. One possible area of concern for this requirement might seem to be the way in which the liberal background requirements of developing certain moral powers could risk excluding those with severe mental disabilities (around whom there are movements that call for equality and justice). However, Schemmel directly and successfully addresses such concerns (see Schemmel 2021, 238n.21, 266n.101, and 283).

Despite this initial impression, there is another area of concern for real world social justice movements where Schemmel's account falls short, and it is an important one. As mentioned previously, in the course of laying out his liberal conception of domination Schemmel explicitly states that this understanding of domination does not allow for a concept of "structural domination". An agent, individual or collective, must be identifiable as the dominator in order for the harm of domination to occur. This is in part because there is always a power asymmetry between individuals and institutions, because of the nature of institutions, and as such that kind of power asymmetry can't be unjust. It is also the result of the wrong of domination stemming from its the agential nature.

It is plausible that Schemmel is right about this explanation for why a concept of structural domination is incoherent on his account. However, the idea of "structural injustice" is a common one in many social justice movements, and does a great deal of explanatory work. If domination cannot be structural, and injustice is primarily about domination, it becomes unclear whether or not the idea of structural injustice can be used within Schemmel's account. From a

theoretical point of view, this may be acceptable. On the other hand, if one of the requirements of a minimally adequate relationalist theory is for it to be able to inform and be informed by such claims about real world injustice, this may give us reason to doubt that relations of domination are sufficient to explain injustice.

Of course, Schemmel recognizes that relations of domination alone are insufficient to account for all of the unjust relations of concern to egalitarians. Unfortunately, harmful social norms and hierarchies of esteem also do not seem to provide sufficient conceptual resources to capture the idea of “structural injustice” and fill in this gap. It is possible that Schemmel’s account could be open to incorporating other kinds of relations of equality and inequality to account for structural injustice, so long as they are still explainable in terms of the liberal background ideas of the person and society, but until that is confirmed the fourth requirement remains a weak spot in Schemmel’s account.

Schemmel’s account does come the closest of the three I have discussed so far to fulfilling the minimum adequacy requirements. But he falls short of one, and that requirement is very important for the plausibility of the account providing the foundation for a theory of justice that could actually be used by social movements outside of academic discussion. As a result, an account that can better fulfill this requirement is still desirable. Schemmel is successful in improving on the first two theories by making his relationalist account clearly one that is both an account of justice and irreducibly relational, while maintaining its egalitarianism, dialectical robustness, and avoiding problematic perfectionism. But it still lacks an ability to account for structural injustices. It also seems to still focus primarily on relations that occur between individuals, in a two or even three place relationships. Although such relations are important for

egalitarianism, it misses the kind of complex systems of relations that are built into the structure of a society and can't be reduced to agents. Given the commitments and claims of real world social justice movements, these features are desirable, and an attempt should be made to find an alternative that accounts for the systemic nature of egalitarian relations.

3.4. Elizabeth Anderson: Democratic Equality

The final theory is Elizabeth Anderson's democratic equality, first presented in her 1999 article.⁴⁰ As one of the earliest theories of relational egalitarianism, Anderson's account does not explicitly articulate the question that is of interest to me, namely about what kinds of relations are "relations of equality". Her primary focus was on presenting her theory and its focus on relations of equality as an alternative to luck egalitarianism. However, implicit in her theory is an understanding of such relations that can be made explicit, and I think despite the advances in relationalist theory since, hers is among the strongest available in important ways. In particular, her extensive attention to the systemic nature of the kinds of relations that are necessary for egalitarian justice is valuable. Her theory remains one of the most fully developed as a positive theory of relational egalitarianism (besides those of Lippert-Rasmussen and Schemmel), and continues to be a common reference point for the relationalist theories developed since. As such, it is worth testing against the minimum adequacy requirements.

⁴⁰ This summary will focus primarily on the theory as it is presented in that article. Although Anderson has published many works that discuss relational egalitarianism since, there is no significant change to the specific element of her theory of democratic equality that is at issue in this project.

Anderson describes the intent of her theory as being to integrate the acknowledgement that distribution is important to equality with a focus on “expressive demands of equal respect” (Anderson 1999, 289). Her theory is therefore described by other relationalist theorists as an expressivist theory that centers equal concern and respect (Lippert-Rasmussen 2018, 40; Voigt 2018, 438 and 442-443), although the expressivist element received minimal development. It also retains a distributive element, in the form of a sufficientarian distribution of capabilities, but the relations within which that distribution happens and which it facilitates are fundamental to justice in a way the distribution is not.

To try to draw out further details of what Anderson thinks it means for these to be relations of equality, it is important to look at the rest of her positive theory and the role they play within it. Anderson describes democratic equality as guaranteeing “all law-abiding citizens effective access to the social conditions of their freedom at all times” (Anderson 1999, 289). This serves to highlight the specific features of relations that express equal respect which are a result of the purpose they are meant to serve within the political community: those relations apply to law abiding citizens only, and their intent is guarantee effective access to (rather than ensuring the possession of) whatever the conditions for freedom entail.⁴¹ Anderson argues that securing such freedom is the entire point of constructing a state in the first place (Anderson 1999, 289), so if effective access to that freedom is not secured, then the state has failed to fulfill its purpose. However, such freedom can only be secured through citizens making claims on each other and

⁴¹ Anderson is adamant that the guarantee is to effective access to functionings, not the functionings themselves (Anderson 1999, 318). This is in part to counter critiques from those, such as luck egalitarians and conservatives, who worry that personal responsibility would play an insufficient role in her account to provide the incentives necessary for a modern economy (Anderson 1999, 318).

the state based on their equality, and the state is obligated to supply what is necessary in order to “unconditionally” ensure that effective access (Anderson 1999, 289).⁴²

The requirement that everyone be guaranteed this effective access traces back to the assertion of basic moral equality that I identified in Chapter 1 as the grounding assumption of all egalitarian theories of justice. The inference to institutions rendering something equal is motivated by the idea that the whole purpose of the democratic state is to secure equal freedom. As such, it is clear that this is an egalitarian theory according to the definition being used in this dissertation. It is not clear yet, however, what the social conditions of freedom entail. Anderson discusses such conditions in terms of people achieving the minimum level of capabilities that are sufficient for keeping people out of oppressive social relations and which are necessary for “functioning as an equal in a democratic state” (Anderson 1999, 316). This is why the relations are more fundamental for justice, because the distribution of capabilities really only matters because of the kinds of relations it prevents or enables.

To further characterize the social conditions that the state must guarantee, Anderson describes democratic equality as a theory of egalitarian justice meant to create “a social order in which persons stand in relations of equality, living together in a democratic community” where that community is characterized by “collective self-determination by means of open discussion among equals, in accordance with rules acceptable to all” (Anderson 1999, 313). Such open discussion means “that one is entitled to participate, that others recognize an obligation to listen respectfully and respond to one’s arguments, that no one need bow and scrape before others or represent themselves as inferior to others as a condition of having their claim heard” (Anderson 1999, 313). It also requires that each person accepts the obligation to “justify their actions by

⁴² Although it does seem to be conditional on both being law abiding and being a citizen.

principles acceptable to the other, taking for granted mutual consultation, reciprocation and recognition” (Anderson 1999, 313), and everyone is “free from oppression to participate in and enjoy the goods of society, and participate in democratic self-government” (Anderson 1999, 315). This is what makes it specifically *democratic* equality.

The explicitly democratic element of Anderson’s theory is its defining characteristic, and colors what relations of equality involve for her. However, she also argues that the social conditions and capabilities necessary for democratic participation rest on two other levels of capabilities. In order to have the capabilities necessary to function as a citizen of a democratic state, one must also (and often prior) have the capabilities to function as both a human being and as “a participant in a system of cooperative production” (Anderson 1999, 317). According to Anderson, thinking about the economy as a “system of cooperative joint production,” where “every product of the economy [is regarded as] jointly produced by everyone working together” is key to understanding the mutual obligations people have toward each other (Anderson 1999, 321). This is because no part of what is produced by the system as a whole can be credited to a specific individual, so the role each person fulfills within the division of labor that makes up the system generates obligations to compensate people for their contribution. Each person’s ability to fulfill their role depends on what is contributed and produced by others in theirs (Anderson 1999, 321), so all members of a society (whether they are producers or consumers) are “collectively commissioning everyone else to perform their chosen role in the economy”, making each the agent of all of the others in making the system as a whole work (Anderson 1999, 322).

It is the concept of society as a system of joint cooperative production as it is elaborated by Anderson that I find particularly powerful, and which will form the starting point for the alternative account of relations of equality that I will discuss in Chapter 4. For Anderson, though,

the joint dependency that is revealed when one thinks about society in these terms strengthens the grounds for requiring equal standing among democratic citizens. It is the requirement of interpersonal justification that Anderson thinks ensures that the policies put in place in a society that is thought of as a system of cooperative joint production will create a social safety net that ensures a sufficient minimum level of capabilities for even the imprudent (Anderson 1999, 325). More importantly for the relational egalitarian, it provides concrete grounds for understanding the value and importance of all roles in a society, including those that are considered “low skill” (Anderson 1999, 326). This in turn provides support for the idea that all people should relate as equals, regardless of the role they play in the system of production. Although this idea helps motivate what Anderson thinks it means to relate as equals, the purpose of such relations is still primarily to ensure that all citizens have access to the social conditions of their freedom and the capabilities necessary to participate as democratic citizens (rather than anything directly to do with the system of cooperative production). This is where my own account in Chapter 4 will deviate from Anderson’s, when I argue that the focusing on the capabilities for democratic citizenship is a mistake. However, for Anderson, it is the core of relational egalitarianism.

What, then, does it mean to relate as equals on Anderson’s account? Relating as equals requires acknowledging all fellow citizens as humans, as members of the system of cooperative joint production, and as participants in the systems of democracy. That acknowledgement requires ensuring particular social conditions, which Anderson describes through the sufficient distribution of capabilities, that also require interpersonal justification among the citizens for all decisions made that impact members of the society in question. That interpersonal justification ensures that the capabilities necessary for effective access to the social conditions of everyone’s freedom are guaranteed by the state.

However, I do not think that it would be accurate to say interpersonal justification is what Anderson takes to be the most essential feature of the kinds of relations necessary for equality. Interpersonal justification is important for democratic equality, because the relations that entail it enable people to participate as full democratic citizens, and it is also a characterization of what relations of equality entail. Despite this, by itself, this idea doesn't capture all of the important elements of what it means to relate as equals that arise in Anderson's account. As a theory of justice, Anderson's account is just as much about what social institutions and structures must be enabled in order for the relations in question to count as relations of equality as it is about the features of the relations between people within those institutions. This is why I described Anderson's democratic equality as an enabling approach earlier in this chapter. I take Anderson's answer to "what kinds of relations are relations of equality?" to be: those relations that enable people to participate as full democratic citizens, whatever they may entail.⁴³

3.4.1. Is Anderson's Account Minimally Adequate?

With Anderson's candidate now clear, it is time to test it against the six adequacy requirements. Her account is deeply institutional and she embraces the two core elements of an egalitarian theory, so it passes the Justice Requirement and the Egalitarian Requirement. Although her use of the capabilities approach may cast some doubt on her ability to avoid problematic perfectionism, I do not think her relational theory is dependent on that distributive currency.

⁴³ Lippert-Rasmussen presents a different characterization of this piece of Anderson's account. He describes what he calls "the relationendum" of Anderson's democratic equality as "expressing equal respect" (Lippert-Rasmussen 2018, 70). Although the expression of respect is an important element, it is important because of what that respect enables citizens to do. Furthermore, as Daniel Putnam points out, "respect" is a vague concept that Anderson does not spell out, and its content can vary depending on the underlying normative account (Putnam 2016, 31-32). I think that he is correct if the idea of expressing respect is taken as an entailment approach, but to do so misses important elements of Anderson's account.

More importantly, the relations of equality she requires are narrow enough and have enough of a focus on institutions tied to the very purpose of a state that she can successfully fulfill the Avoiding Problematic Perfectionism Requirement. The Relational Requirement is also met, as she focuses on the system of relations that forms a society and the irreducibly relational nature of participation in those systems. It is the other two requirements that pose more of a problem, and must now be addressed in depth.

(4) The Real World Requirement: Is Anderson's account able to address real world egalitarian movements?

This requirement is where I think Anderson's theory runs into the biggest problems. The requirement is only fulfilled if the theory is able to inform and be informed by the particular issues and cases that real world social justice movements with valid claims consider instances of inequality and injustice. Unfortunately, there are several groups and issues at the center of contemporary social justice movements that Anderson's theory cannot account for as cases of injustice, simply by nature of her focus on democratic citizenship and her explicit emphasis on law abiding citizens.

For example, one of the most vocal movements in social justice activism in the last couple of years has been the prison abolition movement and the movement to defund the police. The activism of both is at least in part based on claims of injustice against those who have committed crimes by the institutions which are meant to uphold the law. However, Anderson is quite explicit that most of the guarantees her account establishes are conditional on the person being a law abiding citizen and not committing crimes (see Anderson 1999, 289, 313, 314, and 327). As a result, it seems that her account cannot explain an injustice against someone who is considered a criminal by the state.

Similarly, many contemporary activist groups in Western countries are concerned with the unjust treatment of immigrants and visitors to their countries, both legal and illegal. Since these are not citizens, the harmful experiences of such people cannot be conceptualized in terms of injustice within Anderson's theories, even if they would be understood as such if those same experiences were had by a citizen. Justice seems to apply only to citizens of a state, as only they can participate in the democratic processes Anderson's whole account is focused on enabling. This puts Anderson's theory of egalitarian justice out of sync with the justice claims that arise out of the realities of both contemporary and historical human migration between and within states.

Finally, it seems that those who are unable to fully participate as citizens due to severe intellectual disabilities would also be abandoned by Anderson's account of justice, and unlike Schemmel she does not explicitly address this concern. Jeffrey Brown has discussed how a relational theory such as Anderson's could provide an account of the injustices that are experienced by people with mild to moderate intellectual disability. However, even he is skeptical that it can give an account of injustice against those with what he calls "radical cognitive disability" (Brown 2018, 25-26). As Brown points out, at a certain point, radical cognitive disability raises questions about the nature of justice and cognitive status that are beyond the scope of both his project and mine (Brown 2018, 25). However, it is worth noting that participating as a democratic citizen presents a higher bar of cognitive ability for being a subject of justice than the metrics presented by other theories, such as those that only require sentience. This means that if one considers the treatment of people with such disabilities to be a concern of justice and equality, as many of the social justice movements that focus on disability do, in its current form this account fails to address those claims.

None of these three movements are, at this point, fringe movements within the activist community. They are prominent enough that when a relational theory of justice seems to rule out their claims of injustice through its definition of justice alone, it raises some questions about that definition of justice. The theory's inability to account for these cases is not, of course, a reason to completely reject Anderson's democratic equality. It is possible that the claims of injustice by some prominent social justice groups could prove to be unsound, or that the same claims to harm could be better accommodated using other moral concepts. However, these examples give reason to question the adequacy of Anderson's theory, especially because the attention to real world social movements is supposed to be one of the benefits of her account.

(5) The Dialectic Requirement: Is Anderson's account dialectically robust?

It is difficult to determine whether Anderson is able to meet this requirement, since the main source of Anderson's theory is the 1999 article that was the catalyst for relational egalitarianism coming to prominence as an alternative to distributivism in the first place. As such, there was no other literature on what it means to relate as equals for her to engage with, besides proto-accounts from other theorists critiquing distributivism such as Young (1990) and Wolff (1998). Although she discusses Young in some depth, she does not engage with Wolff's work from around the same time at all, which is noteworthy since he was levelling a related critique against many of the same theories.

It also is likely that her own account is vulnerable to some of the criticisms she levels against luck egalitarians. The concerns outlined in the previous section about the ways in which democratic equality may abandon those who break the law, those who are not citizens, and those who are cognitively unable to participate as citizens open up the possibility of a "harshness"

critique similar to when she accuses luck egalitarians of abandoning those who are imprudent (see Anderson 1999, 298 for the original critique of luck egalitarianism and Tan 2008, 676 for how it applies to democratic equality). Each of these is a small flaw in the dialectical robustness of Anderson's theory, which could possibly be addressed with ease from within it. However, taken together they result in a weakness when it comes to the dialectic requirement that undermines some of the theory's plausibility.

Although Anderson's account clearly fulfills three of the requirements, she fails at least one (the Real World Requirement) and has questionable results when it comes to another (the Dialectic Requirement). She also runs into some conceptual problems, as she seems to be making the questionable assumption that democratic participation (and the capabilities needed to facilitate it) is sufficient for egalitarian justice. I will discuss this problem in more depth in Section 4.1., as it does not relate directly to six adequacy requirements I am discussing here.

Despite the requirements that it does not meet, Anderson's account has many virtues. It is clearly an egalitarian theory of justice, and it gets at something about relations of equality that all three of the other theories miss. Relations relevant to justice are not a two place or even three place relationship between individuals. They are instead complex systems of relating that are embedded deeply into the very structure of society. Due to the adequacy requirements it does not fulfill, an alternative to Anderson's account is desirable, but that new account needs to retain and build on these insights. That is the goal of the next chapter.

3.4. Conclusion

In this chapter, I have analyzed each of four theories using the minimum adequacy requirements for a relational egalitarian theory of justice that I outlined in Chapter 2. This analysis has made clear the flaws of each these four relationalist theories, as they all either outright failed or showed serious difficulties related to at least one of these requirements. As I have emphasized throughout, this does not mean that these four theories should be rejected outright. It is possible that the best version of relational egalitarianism available will still be flawed in light of these requirements. However, it does mean that attempts should be made to propose better alternatives that avoid some of the pitfalls that these theories exhibit, developing an adequate account of relational egalitarian justice. The final chapter of this dissertation will make an attempt at developing one such alternative, drawing on elements of some of the theories discussed here.

CHAPTER 4

The Cooperative Systems View

The previous three chapters of this dissertation outlined current discussions of relations of equality within relational egalitarianism, along with a framework for evaluating the various theories which have been proposed. The first chapter provided a roadmap of the literature on egalitarianism as a whole, focusing on the debates between and within distributivism and relationalism. Chapter 2 proposed a set of requirements for what makes an egalitarian theory of justice minimally adequate as such a theory. Finally, Chapter 3 described four of the most developed theories that have been proposed by relationalists, focusing on the kinds of relationships that they propose as the relations of equality required by justice. I then evaluated each of those theories according to the minimum adequacy requirements proposed in Chapter 2. However, that evaluation revealed that each of the theories in question falls short of at least one of those minimum adequacy requirements. The task of this chapter, then, is to propose an alternative account that better fulfills the requirements for an adequate theory. In short, we need a theory that is (1) clearly an account of the political concept of justice rather than some other normative concept (the Justice Requirement), (2) justified by the assumption and inference that defines egalitarianism (the Egalitarian Requirement), (3) not problematically perfectionist (the Avoiding Problematic Perfectionism Requirement), (4) able to address real world egalitarian movements (the Real World Requirement), (5) dialectically robust (the Dialectic Requirement), and (6) irreducibly relational (the Relational Requirement).

I propose an alternative that combines the idea that society has the obligation to equalize individual functioning “as an equal participant in a system of cooperative production” (Anderson 1999, 318) with feminist insights about the dynamics of society as a complex system of production and reproduction. As such I will refer to it as the *Cooperative System view*.⁴⁴

To develop this alternative, I will begin by examining in greater depth the role played in Anderson’s theory by thinking about the economy as a system of cooperative production. I will then re-iterate why Anderson’s focus primarily on democratic citizenship is a mistake, and argue that relations of equality can be better understood through focusing on civil society as a system of cooperative production instead. Drawing on insights from feminist social reproduction theory, I will show how thinking about the interconnection and tension between the parts of the system traditionally thought of as part of the formal economy (production) and those that produce the labor and persons needed for them to function (reproduction) can help make clear what it requires for people to stand as equals within that system. Anderson does briefly discuss how the system of cooperative production goes beyond the formal economy, focusing on non-wage-earning dependent care givers. However, feminist social reproduction theorists provide the resources for a better theoretical understanding of the dynamics of the whole system, and how it can create inequality and injustice.

Social reproduction theory is a method of analysis that focuses on processes, in order to “explore labor and labor power under capitalism” by looking at “capital as a social relation” (Bhattacharya 2017, 4). It extends Marx’s historical materialism to provide a detailed picture of

⁴⁴ This name may, for many political philosophers, invoke associations with Rawls’ liberal conception of society as a “fair system of cooperation” (Rawls [1993] 2005, 543). My view is not dependent on the particular apparatus that Rawls builds around that conception of society. The idea of society as a cooperative system is prominent in many egalitarian views (such as Anderson and Schemmel). However, my view gives such systems (understood in the Rawlsian sense or not) a centrality that makes the name appropriate.

production and reproduction (Bhattacharya 2017, 5), with the insight that “human labor is at the heart of creating or reproducing society as a whole” (Bhattacharya 2017, 2). By focusing on the “complex network of social processes and human relations that produces the conditions of existence” for the worker (Bhattacharya 2017, 5), this method understands oppression as “structurally relational to, and hence shaped by, capitalist production” (Bhattacharya 2017, 3). As a result, feminist social reproduction theorists are particularly focused on “understanding how categories of oppression are coproduced in simultaneity with the production of surplus value” (Bhattacharya 2017, 14).

From this quick outline, it is clear that feminist social reproduction is deeply embedded in the Marxist tradition. It might seem strange, then, for me to draw on such a method when I am developing the grounds for a relationalist egalitarian theory of justice. Egalitarianism as I outlined it in Chapter 1 is part of the liberal tradition, and it and Marxist theories such as social reproduction theory have often been seen as incompatible.⁴⁵ However, I do not intend to just insert a version of feminist social reproduction theory into a relational egalitarian account of justice. Coming as it does from the Marxist tradition, feminist social reproduction theory has theoretical baggage, and particularly perfectionist tendencies, that make it implausible that a relational egalitarian theory of justice that takes up social reproduction theory wholesale would pass the minimum adequacy requirements set out in Chapter 2. Instead, I will argue that feminist social reproduction theory has produced insights about the nature of society as a system of cooperative production and reproduction that can inform a relational egalitarian theory, without

⁴⁵ However, there are some other theorists speaking across these traditions, such as Wolff (2010, 338-339), and even Rawls suggests that at least some of the critical insights from Marx should be adopted by liberals (Rawls 2007, 323).

the theory needing to embrace feminist social reproduction's prescriptive conclusions about the need to destroy capitalism in order to address women's oppression.

It helps that liberal feminists such as Virginia Held (1987), Susan Okin (1989), and Joan Tronto (2013) (among many others) have provided some of the same insights about the particular importance of reproductive labor to justice and equality. However, feminist social reproduction theory's focus on systems and networks of processes in the course of discussing production and reproduction is particularly valuable, especially as it focuses on how categories of oppression are produced through or as essential parts of those processes. Those insights can be expanded beyond the critique of capital in ways that are compatible with liberal egalitarian theory.⁴⁶

With this analysis in place, I will propose an account of the relations of equality necessary for egalitarian justice as those that enable participation as an equal in systems of cooperative production and reproduction, without being structured so that the development of some are parasitic on others. Finally, I will evaluate my account using the minimum adequacy requirements I proposed in Chapter 2.

4.1. Anderson's Democratic Equality and the System of Cooperative Production

As discussed in detail in Section 3.1., Anderson provides only a minimal description of the relations she thinks are necessary for a just society. Within what Anderson does outline in her theory of democratic equality, she focuses on the relations that enable people to participate as full democratic citizens as being the most relevant to standing as equals. In order to achieve

⁴⁶ I do want to acknowledge that debates over Marxist arguments against capitalism do have important implications for those concerned with equality and justice. They are not, however, the topic of this dissertation.

those relations of equality, effective access to the capabilities for several other kinds of functioning must be guaranteed, but the focus and ultimate goal of democratic equality is ensuring access to the benefits and burdens of citizens in a democratic state.

There are three aspects of Anderson's theory of democratic equality that I want to reiterate in depth here, as they coincide with the basis for my own proposed account. First is the importance of interpersonal justification. Anderson describes two people as equal "when each accepts the obligation to justify their actions by principles acceptable to the other, and in which they take mutual consultation, reciprocation, and recognition for granted" (Anderson 1999, 313). This implicitly forms the grounds for the importance of democratic citizenship to the account, as that kind of reciprocal justification is, at least in principle, the whole basis of democracy (see Rawls 1993 [2005], Lecture VI, ebook). Anderson then builds from that account of equality between two people to describe an egalitarian community as one where everyone is "free from oppression to participate in and enjoy the goods of society, and to participate in democratic self-government" (Anderson 1999, 315). However, that idea of interpersonal justification is also tied to the understanding of the economy as a system of joint, cooperative production. When each person plays a necessary role in the system, they should each have a say in the decisions made, which impact them.

This leads us to the second important contribution from Anderson. Although she often described relations of equality as those relations which help secure the liberty of all democratic citizens (Anderson 1999, 289), she also makes clear that freedom requires effective access to the capabilities necessary to function not only as a democratic citizen but also "as a human being, [and] as a participant in a system of cooperative production" (Anderson 1999, 317). This is because functioning as a democratic citizen requires not only functioning as a political agent but

also as an equal in civil society. Participation in civil society requires participation in the economy (which she describes as the system of cooperative production) because it requires the kinds of roles, status, and resources that one can only acquire in the contemporary state through work, or at least direct engagement with those who work. The activities of civil society in turn “presupposes functioning as a human being,” because one cannot work or engage in other civil activities without their basic needs fulfilled (Anderson 1999, 317).

The analysis Anderson gives, showing how this chain of capabilities build on one another, is an important contribution to the relationalist understanding of egalitarianism. It shows the complexity of the relationships involved in creating a society of equals. Relating in ways that enable participation as full democratic citizens involves each citizen acknowledging all fellow citizens as humans, engaging with each other as equally valuable members of the system of cooperative joint production, and ensuring mutually acceptable justification in democratic decision making. Those relations then form social conditions that require the sufficient distribution of capabilities, a distribution determined through interpersonal justification among the citizens. As such, distribution does play an important role in Anderson’s theory, but only because of the kinds of relations to which it contributes.

The third contribution is severely underdeveloped in Anderson, but a crucial insight. One of the examples that she discusses in the processes of criticizing luck egalitarian approaches is the case of the non-wage-earning dependent caregiver (Anderson 1999, 323-324). She highlights the importance of someone taking on this role in helping the system of cooperative production exist in the first place. However, she does not go far enough in theorizing the role of reproductive labor in relations of equality, and the whole system of society, more generally.

Although Anderson succeeds in identifying these three important elements of what egalitarian justice requires, as I mentioned in Section 3.1., there are two critical flaws in her account. The first is a conceptual problem, because Anderson is assuming that enabling participation in systems of democracy is sufficient for justice when it is not. The second is a resulting problem with the application of the theory, because her focus on democratic citizenship limits who can be included within the concern of justice in a way that conflicts with the claims of real world social justice movements

For the first, Anderson assumes that democratic citizenship is a sufficient condition for justice. Now, it is plausible, even likely, that democratic government is a necessary condition for egalitarian justice (although I will not argue for that here). Democracy is generally accepted to be the form of government that best upholds the basic moral equality of all members of the political entity in question since, defined as collective self-government in which everyone has equal say, democracy is inherently non-hierarchical (Talisso 2016, 132). It would seem obvious, following that definition, that successfully implementing a relational egalitarian theory of justice would require a democratic political system. However, even if that is the case, one can participate as a full democratic citizen and still not relate as an equal in the way that is required for relational egalitarian justice.

Although Anderson does argue that egalitarianism requires providing effective access to both the capabilities necessary to avoid oppression and those necessary to function as a democratic citizen (Anderson 1999, 316), her argument for what is required in order to avoid oppression seems to be directly tied to guaranteeing the capabilities necessary for democratic participation. She argues that the capabilities necessary for participating as an equal in civil society must be guaranteed because they are part of what is involved in democratic citizenship

(Anderson 1999, 317). The capabilities necessary to function as a human being are in turn guaranteed because they are presupposed in being able to function as an equal citizen and a participant in the economy (Anderson 1999, 317). She does not seem to recognize that such capabilities, and the relations that enable them, are relevant to justice *independently* of their importance for participating in democracy. As a result, even with her consideration of these three kinds of capabilities, her theory is built on a conceptual mistake.

Due to the resulting limited focus, a second problem arises. Although it is intuitive for most liberal egalitarian theorists to think that what is most important for egalitarian justice is the social conditions for participating as an equal democratic citizen, this narrowness not only mistakes democracy as a sufficient condition, but it also excludes the consideration of claims made by non-citizens and the citizens of non-democratic states from the sphere of justice. When the relationalist theory defines justice in terms of how democratic citizens relate to one another, the concept of justice becomes irrelevant to the relations between democratic citizens and non-citizens, or citizens of nondemocratic states. Nor does it apply to how those who are not citizens of democratic states relate to one another. In order to address the harmful treatment of people who are not democratic citizens, Anderson's view needs to shift normative vocabulary. She can talk about the ways in they can be mistreated, abused, marginalized, exploited, and oppressed, but within her view one cannot use the vocabulary of justice for such cases. That seems costly, as the vocabulary of justice does seem to capture the wrong in these cases, and is used powerfully by those real world social movements who are advocate for such causes. Since many real world social movements, such as those working on behalf of "illegal" immigrants, make their claims in the idiom of the inequalities and injustices faced by such people, it seems counter intuitive that justice could only apply to democratic citizens. It also runs counter to Anderson's own emphasis

on listening to real world social movements to exclude such claims (see Section 3.1.4. for more detailed analysis).

It should be clear at this point that there are some contributions of Anderson's theory that are worth keeping. But they must be separated out from the mistakenly narrow focus on democratic citizenship. To do so, I will now delve deeper into these strengths of Anderson's theory by elaborating on her conception of the system of cooperative production and its role in relational egalitarian justice.

As discussed previously, Anderson argues that functioning as an equal citizen requires participating in civil society, including "enterprises engaged in production for market" (Anderson 1999, 317). In order to fulfill the obligations that citizens have to each other on the level of civil society, they must have effective access to certain capabilities that allow them to function within that sphere. These include "effective access to the means of production, access to the education needed to develop one's talents, freedom of occupational choice, the right to make contracts and enter into cooperative arrangements with others, the right to receive fair value for one's labor, and recognition by others of one's productive contributions" (Anderson 1999, 318).

Furthermore, dividing up the labor and products of that cooperative system in a way that is just requires everyone involved to think about everything that is produced by the economy as the result of everyone working together, each commissioning the others as their agents. Taking this attitude to the division of labor recognizes that no product or part of a product can be traced to a particular individual in isolation from the others, because of the way in which the various roles within the system are dependent upon each other. The contribution of every worker to creating a particular product or output depends on the contributions of everyone else, and "each worker's capacity to labor depends on a vast array of inputs produced by other people- food,

schooling, parenting, and the like” (Anderson 1999, 321). In recognizing the comprehensive, co-dependent nature of this system, those involved should “regard themselves as collectively commissioning everyone else to perform their chosen role in the economy” (Anderson 1999, 322). This includes roles that are considered “low skill”, and Anderson argues that recognizing the importance such roles play in functioning of the entire cooperative system means that even “less productive” work should be valued (Anderson 1999, 326).⁴⁷

The need to follow the principle of inter-personal justification stems from this conception of the economy (and, I will argue, society as a whole) as this kind of cooperative venture. When all roles in the system depend on each other, making them all crucial to the functioning of the system as a whole, the reasons given for policies that impact the division of labor and how benefits and burdens are assigned must be justifiable to anyone else who participates in the economy as a worker or a consumer (Anderson 1999, 322). It is this principle in decision making that serves as a steppingstone to establish the real relations of equality that are important for egalitarian justice: those that enable participation as a democratic citizen. However, in treating a person’s role in the system of cooperative production as merely a means to support the activities of democratic citizenship, she undervalues the importance of those cooperative relations of production (and, I will argue, reproduction) for relations of equality and therefore for relational egalitarian justice. Expanding and deepening the theorization of this understanding of society as a system will demonstrate its importance, and its plausibility as the foundation of relational egalitarian theory. Justice isn’t only, or fundamentally, about democratic citizenship and the relations that enable democratic participation.

⁴⁷ It is worth noting that Anderson does say that those who are capable of working, and have access to jobs, must work (specifically “participating in the productive system”) in order to achieve the functionings they are entitled to (321). So, there is the expectation of taking an active role in the system in order to gain its benefits, even if it doesn’t matter what role.

Having now summarized the components of Anderson's theory that will provide the starting point for building my own account over the next two sections, I want to remind the reader of the two general categories into which I grouped accounts of relations of equality in Chapter 3: what I have called the entailment and enabling conceptions of relations of equality. The entailment conception is about what those relations are, providing a detailed prescription of how people should or should not relate to one another. The enabling conception is about what those relations allow people to do and be, but leaves open the characterization of the relations themselves.⁴⁸ I consider Anderson's theory to be an enabling account because it provides minimal characterization of what relations of equality entail, while providing great detail about what such relations are meant to position people to be and do. My own proposal is also an enabling theory. The benefit of an account that focuses on what certain kinds of relations enable, rather than what they entail, is that it provides room for a pluralist conception of relations of equality while still giving a clear conception of the goal of such relations, allowing for the conclusions of the theory to be evaluated and acted on. In the process, establishing an enabling account of the relations also helps the theory avoid the kind of problematic perfectionism that violates the minimum adequacy requirements outlined in Chapter 2.

4.2. Adding Social Reproduction to the System

I have already discussed some aspects of why thinking about the economy as a system of cooperative production is important. Now, I want to make clear the role that this

⁴⁸ I have intentionally used the language that Nussbaum (2003, 33) uses to describe capabilities but I do not intend to restrict enabling approaches to capability approaches.

conceptualization plays in Anderson's theory of democratic equality. In the course of her criticism of luck egalitarianism, she introduces the notion of cooperative production in order to develop how relational egalitarianism is able to address cases where luck egalitarianism falls short. Specifically, she uses this depiction of civil society in order to demonstrate how democratic equality is better able to ensure the just treatment of those who work dangerous jobs, live in disaster prone areas, or end up taking on the role of dependent caretakers and children. By thinking about the economy as a cooperative system, in which the role each person fulfills is commissioned by every other person through what is required for those other roles, Anderson shows how even roles with high risk, high cost, or seemingly no productive output are crucial components in the system. Furthermore, she begins to demonstrate the obligations of society and fellow workers towards those fulfilling the less desirable and often less valued positions, due to the necessary roles that they play in the functioning of the system (Anderson 1999, 323). In this section, I will use some of the insights from feminist social reproduction theory to further develop the conception of the economy, and society as whole, as a system of cooperative production, which also includes those unwaged roles that Anderson refers to as non-wage-earning dependent caretakers.

The situation of the dependent caretaker is of particular interest to feminist egalitarian theorists, as that role has both historically and today fallen primarily to women. Anderson's attention to such cases is a strength of her account, but she provides minimal theoretical development of how such work, which is usually done in the home, is part of the system of cooperative production. She does effectively point out that the economy should not be confused with the market sector alone, and that the work of the dependent caretaker does "engage in household production" (Anderson 1999, 323). However, although her inclusion of such roles

within the system of cooperative production is correct, that inclusion of the activities of social reproduction (including but not limited to cooking, cleaning, caring for the sick, childbearing, child rearing, providing emotional support, and more) in the system of cooperative production can be given sounder theoretical grounds by drawing on the insights of feminist social reproduction theory.

As Tithi Battacharya argues, “the fundamental insight of SRT is, simply put, that human labor is at the heart of creating or reproducing society as a whole”, leading social reproduction theorists to theorize “the relation between labor dispensed to produce commodities and labor dispensed to produce people as part of the systemic total of capitalism” (Battacharya 2017, 2). Some social reproduction feminists, such as Susan Ferguson, argue that it is a mistake to maintain the division between the two forms of work that often is implied even in feminist and Marxist theorizing (Ferguson, chapter 4, ebook). These theorists encourage a unitary theory of gender and class, and Ferguson particularly praises theorists such as Lise Vogel who focus on “the systemic logic” of the relations of capitalism (Ferguson, chapter 7, ebook). Crucial to feminist social reproduction theory in general is the insight that in order for there to be production there must also be reproduction of the labor (and therefore the people) that does the producing. I would also add that this is true of any system of production, not just a capitalist one, and true in any society as such, not just democratic ones. In any society, as such, labor is needed in order to produce people, who in turn provide the labor needed to produce goods. This creates a universal, socially necessary system of production that must exist in any society in order for it to be a society. Due to this necessity of such a system, I argue that the relations that form the terms for participation in these systems must be the primary concern of justice, and they should not be understood only as being a matter of what is needed for democratic citizenship.

The labor dispensed to produce people, which I will refer to going forward as social reproduction, is precisely the kind of labor that is done by those who Anderson describes as non-wage-earning dependent caretakers. However, for most feminist social reproduction theorists the category of “social reproduction work” is broad, as it includes both waged and unwaged work related to the reproduction of labor power. It can be done by those who are neither dependents nor caretakers in the sense Anderson is thinking, but it does tend to be done by those who are most vulnerable to systemic oppression, and it tends to be the most under-valued. It is these kinds of cases that reveal the necessity of attending to the nature and importance of different kinds of work within the system in order to provide a plausible account of what it means to relate as equals. Feminist social reproduction theory can provide the analytic tools for taking this into account.

Most useful for my account is the way in which feminist social reproduction theorists such as Tithi Bhattacharya theorize the “systemic totality of capitalism” as formed by “the relation between labor dispensed to produce commodities and labor dispensed to produce people” (Bhattacharya 2017, 2). Although in Marx, social reproduction is primarily about “reproduction of the capitalist system as a whole”, feminist social reproduction theorists now distinguish between societal reproduction and social reproduction (Bhattacharya 2017, 6). While societal reproduction corresponds to Marx’s use of “social reproduction,” contemporary feminist social reproduction theorists focus the term as it refers to the reproduction of labor power.

Social reproduction in this latter sense is, in many ways, the motive for production and societal reproduction. The goods that are produced in a society, and the structure of society and its institutions as a whole, are produced and reproduced with the intent of creating, sustaining, and ameliorating human life. Protection from danger, food, water, shelter, clothing, bearing and

rearing children, caring for the sick and elderly, the emotional support of love and friendship, and the enjoyment of leisure time and activities are all almost impossible for a single individual to accomplish in isolation. They are all elements of what these theories consider social reproduction. They are also, arguably, the normative grounds for the creation of the state and political institutions.

The insight that it is in the family where the importance of cooperation was first revealed, and only then expanded to the scale of cooperation that forms the state, can be traced back to theories of early political philosophers such as John Locke and Jean Jaques Rousseau (see Locke [1690] 1980, Chapter 6, 30-42, and Rousseau [1762] 1997, 142). More recently, as was mentioned previously, the importance of reproductive labor, care, and the family for society has been developed in depth by other feminist scholars outside of the Marxist tradition, such as Okin, Held, Tronto, and many others. This confluence of thought shows that much of my argument about the importance of systems of reproduction and reproductive labor can be made without explicitly Marxist commitments. However, drawing on feminist social reproduction theory in particular helps to elucidate the ways in which production and reproduction are deeply intertwined, providing a kind of systemic thinking that helps to show the inseparable interconnection of the various institutions of a society, which in turn reveals the kinds of relations that are necessary for justice within that system. It also helps to illustrate a particular kind of harm and oppression, where the development of some only occurs at the cost of others.

However, while as I noted earlier I do not want to commit to the position that capitalism is dependent on oppression as a means to navigate “the necessary-but-contradictory relationship of capitalistically ‘productive’ to reproductive labour” (Ferguson, chapter 7, ebook), I do want to argue that the existence of hierarchies and oppression, or the lack thereof, is the result of the

relations between and within the work of production and reproduction that creates the processes that hold the whole structure of society together. Thinking about the relations between parts of the system, specifically social reproductive work and what Ferguson calls value producing work, can help facilitate thinking about what relations do and do not enable full participation in both components of the system. Ferguson's description of the relation between productive and reproductive elements of the cooperative system as contradictory but constitutive (Ferguson, ebook) is actually a useful insight to the relational egalitarian, as it reveals how often the ability to participate in one part of the system results in the inability to participate in the other. My account emphasizes the importance for egalitarian justice to enable full participation in both components of the system, in so far as one wants to and given the acknowledgement that in a cooperative system the choices of each person have consequences for all others (directly or indirectly).

4.3. The Relations Required

In the previous section, I established that feminist social reproduction theory provides resources for understanding the system of cooperative production in a way that highlights the importance of reproductive labor and invokes the need to think about society as a complex system of relations that co-constitutively sustain the whole while often simultaneously being in tension. As a result, those relations can be just or unjust, but evaluating them through the lens of justice is not a matter of looking at how they enable participation as a democratic citizens. Instead, it is a matter of ensuring that the systems which produce the people and products necessary to sustain

society and its institutions are structured in ways that enables their participation in those systems on grounds of equality.

As mentioned previously, I think there is a distinct advantage to theorize relations of equality within relational egalitarianism in terms for what those relations enable, rather than what they entail. If the focus is on what those relations allow people to do and be, rather than the characteristics of the relations themselves, there is more room for a theory that has the advantages of a pluralist account discussed by Lippert-Rasmussen and Wolff, while also providing a clear standard of success by which to evaluate whether the relations in question achieve relational egalitarian justice. The focus of my Cooperative Systems view is thus on enabling participation as an equal in systems of cooperative production and reproduction, where me participating as an equal involves both that I recognize the responsibility to contribute to those systems and that the benefits others receive through their cooperation are not at my expense.

It is important to emphasize once again that both the responsibility to contribute and the need to ensure no one unfairly bears the costs of the system applies to the kinds of supports and resources that allow people not only to participate in roles in the traditional sphere of economic production through wage earning jobs, but also to participate in the non-wage earning roles that support the productive economic sphere in various ways. Relationalists must recognize the interconnected, co-constitutive nature of these two elements of the systems that form society. That in turn requires valuing reproductive labor, because only if its importance to the system as a whole is acknowledged on par with the importance of wage earning productive work will the kinds of relations required for egalitarian justice be achieved. The reproductive work that must be enabled is not just reproductive work for others, such as caring for children or elders, cooking

for a family, or doing parallel work for a wage. Reproductive work can also be the work done for oneself, to reproduce one's own labor from day to day. In line with contemporary discussion of "self-care", relations enabling participation in cooperative production and reproduction includes those that enable someone to recharge their own ability to labor through leisure, sleep, feeding their self, and taking care of their health.

I do not want to commit to a particular answer to the question of distribution within a theory built on this conception of relations of equality. Distribution of goods or of capabilities will play an important role in the kinds of relations that they help to build or inhibit.⁴⁹ Such distribution will only be important insofar as it constitutes or results in particular kinds of relationships, which in turn enable the participation in question. I also will not, as part of this project, prescribe what political principles and policies would be necessary in order to act on this conception of relational egalitarianism. However, I think this account of the relations necessary for egalitarian justice provides a strong foundation from which answers to those further questions can be made.

In short, here is the alternative I am proposing. A society (whatever its scope) cannot function without cooperation. As such, people within a society have a responsibility to contribute to that society in various ways through participation in the cooperative systems that sustain it.⁵⁰ However, in order to ensure that such cooperation always occurs among people relating as equals, the systems must not be structured in such a way that any one person's participation requires sacrificing their ability to develop and exercise worthwhile capabilities in

⁴⁹ It seems to be unlikely that welfare will be the currency relevant to distributive questions within this account, although I won't completely rule it out.

⁵⁰ This does not necessarily require sustaining it *as it is*. I take this position to be consistent with pushing for reform and even revolutionary change in the systems in question. There is a responsibility to cooperate to sustain a society as such, not this particular society.

order for others to develop theirs in turn.⁵¹ The structuring of the systems of cooperative production and reproduction must not make the development of some peoples' capabilities parasitic on the languishing of those of others. People relate as equals when society is structured such that no one's participation in the socially necessary systems of cooperative production and reproduction is dependent on them giving up the capabilities that are of value to them.

There are many examples, historically and today, of systems structured in ways that are unjust on this account. One obvious case is that of a 1950s housewife who must shape her own career, activities, and life plan to that of her husband in order to maintain the marriage, without which she would be in dire financial and social straits. Another is the case of a transgender man who does not disclose his identity as transgender because of the cost to his ability to engage in systems of both production (through employment) and reproduction (not only through having children and engaging with family and friends, but also in the sense of maintain his life). In both these cases, the capabilities that the person must sacrifice in order to participate in the system of cooperative production can not be understood in the terms of the contribution they make (directly or not) to participation as a democratic citizen.

What counts as "worthwhile capabilities", and what limits that sets on which cases count as unjust, must be theorized in more detail than I am able to provide here. It is in part an empirical question of what capabilities will be worthwhile in what contexts, both to the individual and to society. It also should be a fairly open conception, in order to avoid perfectionist prescriptions and accommodate a variety of life projects and conceptions of well being. However, it also must be possible to justify the capabilities in question within the context of the cooperative system of production and reproduction. They are not just those that are

⁵¹ I am using the term capabilities in a broad sense here, but I do not intend to imply that the question of currency in matters of distribution must be answered in this way.

worthwhile in the agent's own assessment, although room for what individuals in fact value enough to commit themselves to is important, but simultaneously those that are compatible with a system of cooperation among equals. This is crucial, because even a situation of equality as I have described it here, there will be situations in which trade offs must be considered.

Interpersonal justification can help to provide grounds for those trade offs.

This view captures Anderson's insights about the importance of effective access to the capabilities needed for participation in systems of joint cooperative production. However, it does not merely amend her view. While she argues that such participation in the economy and civil society is important because it supports people's ability to participate as a democratic citizen, I argue that the relations that enable full, equal participation in the system of cooperative production and reproduction are necessary for justice independent of their role in democratic citizenship, because facilitating such social cooperation is (at least in theory) the purpose of a society and its institutions in the first place. Because Anderson focuses on democratic citizenship and the capabilities that enable it as sufficient for rendering people equal, she underplays important dimensions of what is necessary for a system in which everyone relates as equals, and she misses significant real world cases. By making these socially necessary cooperative labor relations the focus of egalitarian justice, my account is able to use the vocabulary of justice to evaluate what happens when those who are not democratic citizens engage in social relations with those who are.

My account can produce a view of what we need to do if we want to further egalitarian justice, focusing on both institutional level changes and the encouragement of shifts in social norms.⁵² Centering such relations also opens up the possibilities for an account of global

⁵² For a discussion about how such a shift in norms can be facilitated without perfectionism or unjustified invasiveness, see Schemmel 2021, Chapter 6.

relational egalitarian justice. Although both of these tasks must be left for future work, that my view opens up such possibilities works in its favor, so long as it does so while also meeting the requirements for an adequate relationalist account, which I will discuss next.

4.4. Testing Against the Minimum Adequacy Requirements

As the reader will recall from Chapter 2 and 3, there are six requirements that a relational egalitarian theory of justice must meet in order to fulfill a minimum threshold of adequacy.

These are that it must be:

- (1) clearly an account of the political concept of justice rather than some other normative concept (the Justice Requirement),
- (2) justified by the assumption and inference that defines egalitarianism (the Egalitarian Requirement),
- (3) not problematically perfectionist (the Avoiding Problematic Perfectionism Requirement),
- (4) able to address real world egalitarian movements (the Real World Requirement),
- (5) dialectically robust (the Dialectic Requirement), and
- (6) irreducibly relational (the Relational Requirement).

As with the four theories that I discussed in the previous chapter, the Cooperative System view must pass the same threshold in order to provide a plausible alternative. What remains of this chapter will evaluate what I have proposed, according to these criteria.

4.4.1. The Justice Requirement: Is this account clearly an account of justice?

In order to fulfill the Justice Requirement, a theory must present:

principles that reside in and determine the structure of institutions of a society that are structured by hierarchical power relations with coercive results, which determine the coordination of benefits, burdens, advantages and disadvantages in that society.

They must also not present:

principles that dictate the ethical obligations of individuals, their conceptions of well-being, and other elements of individual lives that are not within the prescriptive purview of institutions.

The Cooperative Systems view does not presume a particular conception of the ethical obligations of individuals or their conceptions of well-being. Rather, I theorize the obligations that stem from the systemic structure of a political and economic society, and the relations that are needed in order to allow such a society to serve its purpose. As such, I think my account retains the characteristic found in Anderson's theory, of residing in and determining the structure of institutions of a society, and thus it stays in the realm of a theory of justice, according to the broad institutional conception that I describe in Section 2.1.

Using an enabling approach further ensures that it remains an account of justice, as the account does not prescribe the particular character of the relations among members of a society. Instead, it prescribes the institutional purpose of those relations based on an empirical description of what the system is actually like, allowing for individual choice within that overarching intent. Similar to the capabilities approach, it also does not require individuals to actually act on and take advantage of what they are able to do. It instead focuses on the possibilities that are opened to them. Due to the institutional focus, and lack of prescription outside of the institutional level, it remains a clear account of justice.

4.4.2. The Egalitarian Requirement: Is this account justified by the assumption and inference that defines egalitarianism?

Recall that the assumption that grounds egalitarianism is that all people are basic moral equals, from which egalitarians infer that a just political system must render equal something that impacts politically relevant benefits and burdens. My account assumes basic moral equality, and

from there infers that justice requires equalizing participation in society as a system of cooperative production and reproduction. If all people are basic moral equals, then upholding that equality requires that they be able to fully participate in all elements of the cooperative system that exists to reproduce their lives and produce what is necessary for that reproduction. In choosing how to participate, they can only engage as a member of a *cooperative* system if recognize the basic moral equality of all others who fill also roles within it, and recognize that their choices impact those with whom they share the system (as the choices of those others affect them). This systemic thinking, encouraged by feminist social reproduction, strengthens the egalitarian character of my account.

4.4.3. The Avoiding Problematic Perfectionism Requirement: Is this account not problematically perfectionist?

This is the requirement that poses the greatest challenge for my account. Feminist social reproduction theory descends from Marxism, and Marxism is accused by many liberals of having perfectionist tendencies (Schemmel 2021, 8). There is, therefore, a risk that an account that draws on such theories would also be perfectionist. However, by taking an enabling approach and drawing on insights from social reproduction theory rather than using the theory as a whole, the problematic elements of perfectionism can be avoided. This requirement is met so long as the theory is not justified by a comprehensive conception of well-being or flourishing with which a substantial majority of members of the society would reasonably disagree. I incorporate only the descriptive analysis that feminist social reproduction theory provides, and methodological tools focused on thinking about systems and about the reproduction of labor power. These do not incorporate problematically perfectionist prescriptions into my account. Furthermore, because I focus on the idea that relations of equality must be a matter of empowering (not requiring)

participation in certain institutions that are fairly uncontroversial when described as the purpose of society, I think my account can adequately answer this criterion.

4.4.4. The Real World Requirement: Is this account able to address real world egalitarian movements?

It is primarily a concern with the real world claims of injustice that Anderson's theory misses that led to the account I have provided here. Focusing on the system of cooperative production and reproduction ensures that issues around immigration and those in non-democratic countries are included in within the sphere of justice. Furthermore, the focus on the interconnection of production and reproduction allows my account to bring to the forefront issues around gender, race, and labor that are at the center of many real world social movements. This account is thus able to inform and be informed by all of the real world claims of injustice and inequality that Anderson's account captures, as well as some that it misses.

4.4.5. The Dialectic Requirement: Is this account dialectically robust?

This requirement says that the theory must be able to respect to all sound counter-arguments and objections, and not be vulnerable to its own critiques of other theories. It is difficult to for me to evaluate my own theory's ability to fulfill this requirement, as I am attempting to analyze the dialectic robustness of my own account. However, I have done my best to consider the full extent of the existing literature, and to ensure that my account is not vulnerable to the critiques that I have levelled against others. I leave it to readers to determine whether or not I have been successful.

4.4.6. The Relational Requirement: Is this account irreducibly relational?

My account builds a conception of relations of equality that is not only based on relations among people, but the relations among the different institutional elements of the society in which they live and engage in those personal relationships. The relational analysis of system of cooperative production and reproduction, as well as the kinds of relations between individuals that must result in order to enable full participation in that system, makes this account irreducibly relational. Trying to reduce those elements of human life to distributions of goods, welfare, or even capabilities distorts them in a way that would result in a failure to capture what is needed for a just society, because such a reduction will miss important features of egalitarianism that a systemic analysis that the insights of feminist social reproduction theory helps to add. As a result principles, policies and practices based on a theory that puts distribution into the foreground will fail to address important elements of the system of cooperative production and reproduction. That system is not only a matter of the distributable goods produced, or even the services that could plausibly be talked about in distributive terms. It is also about the relations that making the producing and reproducing possible.

4.5. Conclusion

In this chapter, I have presented my own, alternative account of what relations are required by relational egalitarian justice. Using the same framework that I applied to the theories presented by Anderson, Scheffler, Schemmel, and Lippert-Rasmussen, I have evaluated my own proposal. According to those criteria, my proposal is able to avoid falling into some of the same difficulties faced by those other theories, although others may arise if a different set of criteria were applied.

As such, I suggest that my account of these relations of equality, which sees justice as requiring relations that enable full participation in systems of cooperative production and reproduction, provides a more plausible foundation for a relational egalitarian theory of justice. It also provides a stronger foundation from which relationalists can engage in debates with distributivists, and on topics such as currency, site, scope, and more. Although I have not explored it here, I also think that this account of relations of equality provides strong grounds for engaging with critics of egalitarianism from other traditions such as Marxist feminism, decolonial theory, and more. However, those questions will have to wait for another time and another project.

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