



## Equality

### Introduction

As per the **syllabus**, equality includes **social, political and economic dimensions**, along with the **relations between equality and freedom**, and the role of **affirmative action**.

### Equality – The Core Idea

At its heart, **equality is a relationship**. Not in the sense of everyone being *identical*, but in the sense of how **two or more persons or groups relate to each other** in society.

It's always about **comparison** — “*How do I stand in relation to you?*”

### Aspects of Life where Equality Matters

#### 1. Political Equality

- Every citizen has **equal political rights** – one person, one vote, one value.
- Example: No matter if you're rich or poor, when you enter the polling booth, your vote carries the same weight.

#### 2. Social Equality

- No one should face discrimination because of caste, race, gender, or religion.
- It means **equal dignity and status** in social life.
- Example: Abolition of untouchability in India → recognition of everyone's equal worth.

#### 3. Economic Equality

- Not absolute sameness of wealth (that would be impossible), but **fair opportunity and minimum standards** so no one is left to starve while others hoard.
- Example: Progressive taxation, welfare schemes, MGNREGA in India.

### The Essence

Equality is not about **making everyone the same**, but about ensuring **no one is pushed below**, and **everyone stands with dignity in relation to others**.

Think of it this way:

- **Political equality** gives you a **voice**,
- **Social equality** gives you **respect**,
- **Economic equality** gives you **basic security**.

Without all three, equality remains incomplete.



## Evolution of the Idea of Equality

### 1. Aristotle

- For Aristotle, equality was linked with his **theory of citizenship**.
- He emphasized **formal equality** → “treat equals equally, and unequals unequally.”
- But here’s the catch: he also defended **natural inequality**.
  - Example: He justified slavery and limited citizenship to a small elite, saying it was “natural” to recognize and maintain such inequality.

Lesson: Aristotle planted the seed of equality, but it was exclusionary.

### 2. Hobbes

- Hobbes shocked his time by saying: in the **state of nature**, there is **natural equality** between all humans.
- Why? Because while some may be stronger in body, others can use **secret plot** or cunning → which equalizes things.
- Everyone is also equally bound by **pleasure and pain**.

Lesson: Hobbes made equality universal, but in a fearful, competitive sense.

### 3. Rousseau

- Rousseau drew a sharp line between:
  - **Natural equality** → unalterable, given by nature.
  - **Unnatural/conventional equality** → alterable, created by society (privileges, property, class).
- He warned that property and privilege corrupt natural equality.

Lesson: Rousseau pointed towards the birth of modern democratic equality.

### 4. Marx

- Marx went further → no half measures. He demanded **absolute equality**.
- His principle:
  - “**From each according to his ability, to each according to his need.**”
- This was not just equality of opportunity, but **equality of outcomes**.

Lesson: Marx radicalized equality — not just removing privilege, but abolishing class exploitation.



## 5. Alex de Tocqueville

- Observing America, Tocqueville saw **equality as the tendency of modern society**.
- He noted: the world was moving irreversibly towards more democratic equality.

Lesson: Equality is not just a theory; it's the spirit of modern times.

### The Essence

See the journey?

- **Aristotle** → equality for some.
- **Hobbes** → equality in fear.
- **Rousseau** → equality corrupted by privilege.
- **Marx** → equality perfected in communism.
- **Tocqueville** → equality as destiny of modernity.

The **idea of equality evolved from a limited privilege to a universal aspiration** — becoming the heartbeat of democracy.

## Why Equalise?

### 1. Fair distribution of benefits and burdens

- Society creates both **benefits** (like education, healthcare, jobs) and **burdens** (like taxes, duties, responsibilities).
- If these are distributed unfairly, resentment grows, and society fractures.
- **Equalisation** ensures that no group enjoys all benefits while others carry all burdens.  
Example: Progressive taxation ensures the rich pay more, so the poor aren't crushed under burdens.

### 2. Fulfilling basic needs

- Equality isn't just an abstract idea; it's about **basic needs**.
- Food, shelter, healthcare, and education are the foundations of human dignity.
- Equalisation ensures **no one is left behind**, so everyone has at least the minimum to live a decent life.  
Example: Schemes like **Right to Education** or **Public Distribution System** in India aim at this.

### 3. Enhancing self-respect

- Inequality often humiliates. Being treated as "less than human" crushes self-worth.
- Equality restores **self-respect** by recognising every individual as worthy.
- Historical example: the **abolition of untouchability** in India → it wasn't just legal reform, it was restoring human dignity to millions.



#### 4. Fostering fraternity

- Equality is not only about individuals, but also about relationships.
- When citizens see each other as **equals**, it nurtures **fraternity** → the sense of brotherhood and solidarity.
- Without equality, fraternity is impossible, because hierarchies breed suspicion, not trust.  
Example: The **Constitution of India** placed equality, liberty, and fraternity together for this reason.

#### The Essence

So, why equalise?

Because equality is not just about numbers or policies. It is about:

- **Fairness in burdens and benefits**
- **Meeting basic needs**
- **Restoring self-respect**
- **Building fraternity**

In short, **equalisation is what makes democracy humane and society united**. Without it, liberty becomes privilege, and justice becomes hollow.

#### Equality of What

##### Welfare Equality

##### 1. Utilitarian perspective

- Utilitarianism asks: *What maximises overall welfare?*
- Here, **welfare equality** is judged not by how much **resources** someone gets, but whether their **happiness** or **desires** are satisfied.

##### 2. Two dimensions of welfare equality

**Happiness = Pleasure – Pain**

- Think of life like an account book:
  - **Pleasures** are credits
  - **Pains** are debits
- What matters is the **net balance**.
- If two people both end up equally happy (same net balance), then welfare equality is achieved—even if their resources differ.

Example: A rich person with stress may have the same happiness balance as a farmer with contentment.

##### Desire / Preference satisfaction

- Here, the focus shifts: it's not about wealth, but about **meeting desires**.



- If your **desires** are satisfied, you are as well-off as someone else, even if the things desired are very different.  
Example: A taste for **expensive jewellery** vs. the simple joy of **riding a bicycle** → both are treated **at par** if they equally satisfy the individuals' preferences.

### 3. Key Insight

- **Welfare equality** is not resource-focused.
- It says: "Don't count what people *have*, count whether they're *happy* or *satisfied*."

### The Essence

This view is powerful, but also **problematic**:

- If someone has very **expensive desires** (like luxury cars), welfare equality says it's the same as someone satisfied with a bicycle.
- But doesn't this let inequality in **resources** hide under equality of **desires**?

That's why later thinkers like **Amartya Sen** asked: *Equality of what? Resources? Welfare? Capabilities?*

So, in **Welfare Equality**, remember the **two dimensions**:

- **Happiness (pleasure–pain balance)**
- **Desire / preference satisfaction**

It's a subtle but deep idea: **not how much you own, but whether you are satisfied**.

## Equality of Resources

### 1. Rawls and beyond

- **John Rawls** argued for a *fair distribution of resources* through the **difference principle**.
- But **Ronald Dworkin** said: let's go deeper! He wanted a **resource egalitarian conception**—a framework where people get **equal resources**, but outcomes may differ depending on their **ambitions** and **choices**.

### 2. The Clamshell Market

- Imagine: everyone gets **100 clamshells**—the currency in a **perfectly competitive market**.
- With these clamshells, people can buy whatever bundle of resources they want—land, tools, food, books.

Why clamshells? Because they are **equal starting tokens** of opportunity.

### 3. Two-stage process

#### (i) Ambition-sensitive auction



- People bid their clamshells in an **auction**.
- The result: bundles of resources differ according to individual **ambitions**.  
Example: One person spends clamshells on art supplies, another on farming tools.
- This passes the **envy test** → No one should envy another's bundle, because differences reflect *their own ambitions and choices*.

## (ii) Endowment-sensitive auction

- But what about people born with **disabilities** or **natural disadvantages**?
- Dworkin adds a layer of **insurance**: society compensates for **natural endowments** like illness or disability.  
Example: If someone is blind, the market gives them *extra clamshells* (insurance payout), so they can still compete fairly.

## 4. Key Insight

- Dworkin's model balances **freedom** and **fairness**.
- Equality doesn't mean same outcome, but same **starting resources**.
- **Ambition-sensitive** → rewards choices.
- **Endowment-sensitive** → corrects brute luck.

## The Essence

Think of it this way: Dworkin is saying —

*“Let everyone start the race with the same shoes and track. If someone has a broken leg, give them support. After that, how far they run is up to their ambition.”*

That's **equality of resources**: fair start, fair compensation for brute luck, but responsibility for your own choices.

## Equality of Capabilities

### 1. Sen's Core Argument

- Sen said: Don't stop at **income** or **resources**.
- Real equality lies in **real freedom** — what people are actually *able to do* and *to be*.  
Can they **read**?  
Are they **healthy**?  
Do they have **self-respect**?  
That's the measure of well-being.

### 2. Function vs. Capability

- **Function** = an activity or achievement.  
Example: *Reading a book*.





- **Capability** = the *freedom to achieve that function*.  
Example: *Being literate* so that you can read if you choose to.

So, Sen says: Don't just see if people are reading → ask whether they *have the capability* to read.

### 3. State's Role

- The state should focus not just on providing **functions** (like schools, hospitals), but on ensuring **capabilities**—real opportunities to use them.  
Example: Giving a girl textbooks (resource) is not enough if she is not **literate** or not **allowed** by society to study.

### 4. Resource Equality vs. Capability Equality

- **Resource equality** = equal distribution of **books, income, education services**.
- **Equality of capability** = depends on both **external conditions** and **internal ability**.  
Example: Two students get the same books.
- One, due to good health, family support, and literacy, can use them.
- Another, due to illness or discrimination, cannot.

So, equality is meaningless unless we check whether people have the **real freedom** to convert resources into achievements.

### The Essence

Sen is telling us:

*“Don't just count what people have. Count what they can do with what they have.”*

It's like giving everyone a bicycle. If one person knows how to ride and another doesn't, resource equality exists—but **capability equality does not**.

That's why **Sen's Capability Approach** shifted the debate from **things** (income, resources) to **real freedoms**—the power to live with dignity, choice, and self-respect.

### Complex Equality – Michael Walzer

#### 1. Communitarian Roots

Walzer was a **communitarian**. He believed that **justice and equality are not universal**; they vary:

- From **society to society** (depending on culture, traditions, values).
- Within a **single society**.
- Even between different **spheres** (political, social, economic).

So, equality isn't one-size-fits-all. It's *plural* and *contextual*.

#### 2. Spheres of Justice

Walzer said society is divided into **spheres**:



- **Political sphere** → power, leadership, voting.
- **Economic sphere** → money, business, trade.
- **Social sphere** → family roles (father, mother, children), friendships, community.

Each sphere has its own **rules of justice**.

In family life, love matters, not money.

In politics, votes matter, not wealth.

In economy, hard work and market value matter, not social status.

### 3. No Single Equality

- There is no **single notion of equality** across all spheres.
- Inequalities **within a sphere** may be acceptable (a mother is not the same as a child, a boss is not the same as a worker).  
But! That inequality should **not spill over** into other spheres.

### 4. The Key Rule

**Inequality in one sphere should not dominate another.**

Example:

- If someone earns huge **money** in the **business sphere**, they should not buy **political power**.
- If someone has **political office**, they should not use it to gain **economic wealth**.
- If someone is respected as a **religious leader**, they should not impose authority in the **political sphere**.

This keeps society balanced and prevents **tyranny of one sphere over others**.

### The Essence

Walzer is basically saying:

*“Justice is not simple. It is complex. Each part of society has its own rules. Don’t let power in one area take over another.”*

Think of it like **different games**:

- Cricket has rules.
  - Chess has rules.
  - Football has rules.
- A good player in cricket cannot demand the same privileges in chess!

That’s **Complex Equality** → respecting the **plurality of justice** across spheres, ensuring fairness without letting one kind of power dominate all.





## Dimensions of Equality

### 1. Legal Equality – Liberal Theory

- At the foundation of **liberal theory** lies **legal equality**.
- It means **equality before law** and **equal protection of law** – *no one is above or below the law*.
- But it's not just formal; it also **justifies corrective policies** like:
  - **Reservation** (to uplift disadvantaged groups).
  - **Progressive taxation** (the rich contribute more for fairness).  
Law isn't only about sameness, it's also about **justice in real terms**.

### 2. Political, Social, and Economic Equality

- Equality is **multi-dimensional**. It spans:
  - **Political equality** → equal right to vote, contest, and participate.
  - **Social equality** → no caste, race, gender, or religion-based discrimination.
  - **Economic equality** → no extreme concentration of wealth, fair opportunities.  
Together, these ensure a **balanced structure of justice**. If one dimension fails, equality as a whole collapses.

### 3. Formal Equality

- This is the **surface layer**: laws and rules treat everyone **uniformly**.
- It covers **legal equality + political equality**.  
Example: Every citizen gets **one vote**, every person is **subject to the same criminal law**.  
But formal equality is not enough if deep social and economic inequalities persist.

### 4. Substantial Equality

- Goes deeper than the legal surface.
- It's about **real equality in society and economy**.
- **Social equality** → no **discrimination** based on caste, race, religion.
- **Economic equality** → addresses the debate:
  - **Equality of opportunity** (everyone gets the same starting line).
  - **Equality of outcome** (compensates for structural disadvantages so everyone can finish fairly).  
Substantial equality is where the **heart of justice** beats – making equality **real, not just on paper**.

### The Essence

Think of it like building a house of justice:

- **Legal equality** is the foundation (everyone equal before law).



- **Political, social, and economic equality** are the **walls** (structure of fairness).
- **Formal equality** is the **paint** (uniform treatment).
- **Substantial equality** is the **furniture inside** – making the house truly livable for everyone.

Without **substantial equality**, the house looks good from outside but is empty inside.

## PYQ

1. Comment on: Equality of Opportunity
2. "Equality of estates caused equality of power, and equality of power is liberty." Comment. 2022, 15
3. The nature of relationship between equality of democratic citizenship and liberty of citizens is influenced by economic equality. Comment. 2024, 15
4. Equality means fair treatment rather than equal treatment. Comment. 2018, 15
5. How is liberty a precondition for equality? Explicate the relationship between equality and liberty 2014, 15
6. Difference between equality of opportunity and equality of outcome. 2012, 10



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