Critical Exchange | Egalitarian Relations, Unequal Distributions, and Functioning Self-Respect

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Introduction

In recent decades, relational egalitarians have argued that a just society is not one where individuals hold an *equal* amount of certain valuable good(s) – e.g., resources or opportunities – but one in which they relate to each other as *equals*.[1]

Until recently, however, relational egalitarians have mainly focused on (i) criticising distributive views of equality[2] and (ii) identifying hierarchical relationships that are incompatible with the ideal of relational equality, whereas they have failed to offer a positive view of the demands of a society of equals. Christian Schemmel's recent book, *Justice and Egalitarian Relations*,[3] fixes this shortcoming by developing the first systematic and comprehensive theory of relational equality. Specifically, the aim of the book is to provide "a theory of how concern for egalitarian relations of non-domination and social status can be incorporated into a liberal conception of social justice" (3).

The book is divided into two parts. The first part (chapters 1-6) develops the normative requirements that are entailed by the ideal of relational equality. The second part works out the implications that this

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[1] Anderson 1999; Lippert-Rasmussen 2018; Scheffler 2003; Wolff 1998.

[2] For prominent theories of distributive equality, see Arneson 1989; Cohen 2009 and Dworkin 1981.

[3] All references without any indication of author and year of publication are to Schemmel (Oxford University Press, 2021).

relational view has for political equality (chapter 7), distributive equality (chapter 8), and health care (chapter 9). Drawing on a variety of different literatures, Schemmel develops a nuanced and compelling relational egalitarian view, and illustrates its implications for the main domains of social justice. The book is rich and ambitious. It is thorough, intricately argued, and defends a set of original and convincing conclusions.

This discussion note examines two aspects of Schemmel's theory: section 1 addresses Schemmel's critique of distributive views of equality. Section 2 discusses Schemmel's account of the role that self-respect should play in a theory of relational equality.

1. Egalitarian relations and unequal distributions

The main aim of chapter 2 is to motivate the search for a relational egalitarian conception of social justice (22). Specifically, Schemmel defends two claims. First, he argues that "distributive views of equality cannot account for the specific importance to justice of the *way* that social institutions create or maintain inequalities between individuals in society – how institutions *treat* individuals, as opposed to which patterns of distribution they bring about" (22; emphasis in the original). Call this, the *relational egalitarian claim*. Second, Schemmel rejects the "'Core Distributive Thesis': the distribution of non-relational goods has relation-independent significance from the point of view of justice" (Miklosi 2018, 113). Therefore, Schemmel argues not only *for* the intrinsic importance of relational equality but also *against* the intrinsic moral importance of distributive equality.[4]

In this section, I argue that what Schemmel says in chapter 2 is not sufficient to reject the "Core Distributive Thesis", and that rejecting the "Core Distributive Thesis" might be independently implausible anyway.

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[4] This emerges clearly when Schemmel addresses some possible answers to his criticism of distributive views. One possibility, which has been defended by G.A. Cohen (2009), is to maintain that "distribution and treatment [are] different spheres *within* justice" (30; emphasis in the original). Schemmel rejects this possibility, observing that pluralism about social justice has significant costs – such as balancing competing considerations on a case-by-case basis – which we have strong reasons to avoid (30-31).

Let us begin by reconstructing Schemmel's argument. To show that distributive views are unable to capture the way in which institutions treat individuals – and that this is something that a plausible theory of social justice should be able to account for – Schemmel considers the example of the "vital nutrient V":[5]

> [Distinguish five] different scenarios in which, owing to the arrangement of social institutions, a certain group of innocent persons is avoidably deprived of some vital nutrient V – the vitamins contained in fresh fruit, say, which are essential to good health. The [five] scenarios are arranged in order of their injustice, according to my preliminary intuitive judgment. In scenario 1, the shortfall is *officially mandated*, paradigmatically by the law: legal restrictions bar certain persons from buying foodstufs containing V. In scenario 2, the shortfall results from *legally authorized* conduct of private subjects: sellers of foodstufs containing V lawfully refuse to sell to certain persons. In scenario 3, social institutions *foreseeably and avoidably* engender (but do not specifically require or authorize) the shortfall through the conduct they stimulate: certain persons, suffering severe poverty within an ill-conceived economic order, cannot afford to buy foodstufs containing V. In scenario 4, the shortfall arises from private conduct that is *legally prohibited but barely deterred*: sellers of foodstufs containing V illegally refuse to sell to certain persons, but enforcement is lax and penalties are mild. In scenario 5, the shortfall arises from social institutions *avoidably leaving unmitigated the effects of a natural defect*: certain persons are unable to metabolize V owing to a treatable genetic defect, but they avoidably lack access to the treatment that would correct their handicap (27-28; emphasis in the original).

E*x hypothesi*, the distributive inequality – i.e., the deprivation of the vital nutrient V – is equal across the five scenarios; hence, the five scenarios are equally wrong from the standpoint of distributive views. This, however, is not a convincing conclusion: even if we hold other relevant factors – such as "number of victims, foreseeability and avoidability of outcome, and costs of remedy" (38) – fixed, we still find it intuitive plausible to maintain that the five scenarios are not equally wrong. This, Schemmel

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[5] This example was originally proposed by Thomas Pogge (2008, 47-48).

argues, is explained by the different *attitudes expressed* by social and political institutions. For example, in scenario 1, where the deprivation of a certain social group is officially mandated, social institutions express an attitude of *hostility* towards that social group. In scenario 2, instead, where the deprivation is the result of the legally authorized conduct of private citizens, the attitude is one of *contempt* (38). But treating people with hostility is more unjust than treating people with contempt, other things being equal. Therefore, the kind of disrespect expressed by social actions provides a principled way to rank the degree of injustice in the different scenarios.

The example of the "vital nutrient V" illustrates why the different modes of institutional treatment matter from the standpoint of justice. Thus, it offers a compelling justification for the relational egalitarian claim. However, accepting the relational egalitarian claim does not entail rejecting the "Core Distributive Thesis": from the fact that distributive views fail to capture *an* important dimension of justice, it does not follow that they are unable to capture *any* dimension of justice that has intrinsic moral importance. Hence, Schemmel's expressive analysis of the "vital nutrient V" example does not rule out the possibility that the most plausible theory of social justice is pluralist, including distribution and treatment as two distinct and intrinsically important dimensions of social justice.

This point can be further strengthened by analysing whether it is indeed plausible to maintain that all distributive aspects can be reduced to and explained by relational considerations. To illustrate this, consider an example, which is modelled after the "vital nutrient V" example but where the relational wrong is kept constant while the distributive shortfall varies across the scenarios.

Distinguish three different scenarios in which, owing to the state's official mandate, a group of innocent persons is avoidably deprived of vitamin D, the lack of which causes severe migraine headaches. In scenario 1, the only way of getting vitamin D is by purchasing foodstuffs containing vitamin D from local shops. Accordingly, the group of people who are prohibited from buying foodstuffs containing vitamin D suffer from severe and frequent migraine headaches. In scenario 2, although the legal restrictions barring certain people from buying foodstuffs containing vitamin D, they can still take a limited

amount of vitamin D, thanks to some limited natural resources they have access to. As a result, they suffer from less severe and less frequent migraine headaches than in scenario 1. Finally, in scenario 3, there are plenty of natural resources available. This allows individuals who are banned from buying foodstuffs containing vitamin D to get an almost adequate daily intake of vitamin D. Hence, they suffer from very rare and mild episodes of headache migraines.

In the "vitamin D" example, the relational wrong is equal across the three scenarios: the attitude(s) expressed by the state's social action is the same. Furthermore, *ex hypothesi*, different degrees of health deficit do not impact the quality of the relations between the members of society. Hence, scenarios 1-3 are equally unjust from the standpoint of relational equality.

However, some might think that this is not a convincing conclusion. On the contrary, it seems plausible to maintain that scenarios 1-3 are arranged according to the degree of their injustice. For example, some might hold that the degree of injustice is explained by an appeal to a particular conception of fairness, whereby it is unfair if someone is worse off than others through no fault of their own. Others might maintain that persons have a right to an adequate daily intake of vitamin D, regardless of whether this is essential to stand in relations of equality. If so, the innocent people in scenarios 1-3, who are deprived of vitamin D, not only have a legitimate *relational* complaint against being considered and treated as inferiors by the social institutions, but they also have an additional independent *distributive* complaint that they do not have (equal or adequate) access to a distributive good. This distributive claim offers a principled way to rank the different degrees of wrongness of scenarios 1-3.

Schemmel might object that even if his view is unable to capture the different degrees of wrongness of scenarios 1-3, this is not a problem because such scenarios do not involve claims of justice. If true, whatever we may think of the "vitamin D" example does not undermine the claim of relational equality to be a comprehensive theory of social justice.

But it is hard to see on what grounds this claim can be defended. First, the health deficits in scenarios 1-3 are socially caused; therefore, according to relational egalitarians, they fall within the domain of the responsibility of social institutions (33-35). One might then deny that

"distributive fairness" generates claims of justice. However, even if "distributive fairness" were the *only* value that could account for the intrinsic moral importance of distributive justice, it is unclear what independent reason relational egalitarians can offer to rule it out as a plausible basis for why distributive justice matters in and of itself.

Schemmel's example of the "vital nutrient V" is meant to elicit the intuition that even if we hold the distributive shortfall equal across a number of scenarios, they are not equally unjust. Hence, there is more to social justice than distributive outcomes. The "vitamin D" example is meant to elicit the intuition that even if we hold the degree of relational wrongness constant across a number of scenarios, they are not equally unjust. Hence, there is more to social justice than the quality of social relations. In each case, the intrinsic moral importance of the relational and the distributive dimension is therefore justified in an intuitive way. This might then be a case of reasonable disagreement about fundamental values that cannot be resolved by further substantive arguments.

To conclude, in this section, I have argued that (i) even if we accept Schemmel's expressive analysis of the intrinsic moral importance of the quality of social relations, this alone does not entail denying that the distributive dimension has relation-independent significance from the point of view of justice, and (ii) that it is unclear that we have compelling independent reasons to deny the "Core Distributive Thesis". Like the quality of relations matters independently of its distributive effects, so the quality of distributions might matter independently of its relational effects.

2. I*negalitarian relations and functioning self-respect*

One of the main contentions of Schemmel's theory of relational equality is that the avoidance of domination is the most pressing, but not the *only*, concern of social justice. Accordingly, in chapter 6 Schemmel examines what other inegalitarian relations – besides unequal relations of power and domination – are wrong from the standpoint of relational equality. In this section, I address Schemmel's original and interesting argument for why an appeal to self-respect is unable to condemn *all* kinds of inegalitarian relations.

Relational egalitarians typically argue that egalitarian relations are a fundamental social base of self-respect. The argument unfolds as follows:

1. Persons' sense of self-respect is crucial to maintain, develop, and exercise their basic moral powers – i.e., the capacity for a conception of the good and the capacity of a sense of justice.
2. Persons' sense of self-respect depends on how they are considered and treated by others.
3. Therefore, unequal relations are wrong because they undermine persons' sense of self-respect, thereby preventing them from developing, maintaining, and exercising their basic moral powers.[6]

Schemmel argues that a proper understanding of self-respect reveals that (2) should be rejected. Hence, an appeal to self-respect cannot explain the wrongness of *all* inegalitarian relations. To assess Schemmel's argument, it will be helpful to explain it in more detail.

Schemmel distinguishes between *standing* self-respect and *standards* self-respect. The former corresponds to one's conviction of their own worth and the kind of consideration and treatment that they are entitled to. The latter consists in an individual's conviction that they are capable of formulating and carrying out valuable projects (179). Accordingly, "functioning self-respect assures us that we are effective authors of our own actions, that these are worth it, and that we are responsible for them; therefore, it plays a crucial role in enabling, and shoring up, personal autonomy" (180). Hence, a liberal egalitarian society ought to ensure that individuals have access to the social conditions necessary to develop and maintain a functioning self-respect.[7]

Schemmel observes that some inegalitarian relations – such as domination and pervasive inegalitarian norms of social status – clearly undermine both dimensions of self-respect. However, "for both the dimensions of standing and standards self-respect, it is problematic to hold that *all* domination, and *all* norms of social esteem instituting some inequalities, are such threats to self-respect" (181; emphasis in the original). This is because having a *functioning* sense of self-respect consists in having a

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[6] See, for example, Rawls 1971.

[7] See also Schemmel 2019.

robust awareness of one's worth and one's talents: a person who has a proper sense of self-respect can retain it even in the face of adversity. Therefore, there are at least some inegalitarian relations that ought not to undermine a person's sense of self-respect. Hence, not all inegalitarian relations are wrong *qua* violations of a person's sense of self-respect.

In what follows, I raise two challenges to Schemmel's account of self-respect. The first challenge concerns how inegalitarian relationships that undermine self-respect can be distinguished from those that do not in a non-arbitrary way. To illustrate, consider the following cases.

First, consider the case of a person of colour, Lebron, who is stopped and searched by the police while he is in a white upper-middle-class neighbourhood. Following Schemmel, this injustice should not weaken Lebron's sense of self-respect. On the contrary, Lebron's standing self-respect allows him to react with indignation to this injustice, protesting that it is an unacceptable form of discrimination.

However, whether or not an injustice is a threat to a person's self-respect does not depend on its content alone. For example, suppose that the injustice Lebron is a victim of is part of a systemic practice of racial profiling. Lebron knows that the police – not just these police officers – stop and search people "like him" for no legitimate reason, simply because society perceives them as threats especially when they are in areas they are deemed not to belong. If the practice of racial profiling is pervasive enough, then it is plausible to maintain that this injustice does wound Lebron's sense of self-respect, for he is aware that social institutions do not consider and treat him as an equal in some basic sense. If this is true, then the following question arises: how pervasive must an inegalitarian practice be to undermine individuals' sense of self-respect? What is the threshold level of moral significance of the pervasiveness of a social inegalitarian practice? It is very difficult to see how we can answer this question in a non-arbitrary way.

Consider another case. Katie is part of the board of directors of a company. During a board meeting, the board chair paid attention to the other directors' opinions and praised them for their brilliant ideas, while ignoring Katie. Presumably, this inequality of social esteem should not undermine Katie's standards self-respect. On the contrary, her robust sense of self-respect allows her to maintain a strong conviction about her abilities to do the job as well as her peers.

But while this assessment of this inegalitarian relation is plausible from a synchronic perspective, it is unclear whether the same assessment is plausible from a diachronic perspective. To see this, suppose that Katie was not only ignored during this board meeting, but she has been systematically ignored during board meetings over the course of a long period. This prolonged inequality of social esteem between Katie and her peers does seem to be a threat to Katie's self-esteem: seeing her colleagues praised for their contributions, while being constantly ignored, makes Katie lose confidence in her capacity as a director of the company. More generally, the length of an inegalitarian relationship seems a relevant factor in the assessment of whether it ought to weaken people's sense of self-respect or not. Hence, this raises the question of what the sufficient length for an inegalitarian relation to undermine people's sense of self-respect is. In other words, what is the threshold level of the moral significance of time in the assessment of inegalitarian relations? This, again, is a question that can hardly be answered in a non-arbitrary way.

The general implication of this analysis is that even assuming that some inegalitarian relations ought not to undermine people's sense of self-respect, it is often very difficult to distinguish them from those inegalitarian relations that do violate individuals' sense of self-respect. The reason for this is that there are several relevant factors to be taken into account when assessing the wrongness of an inegalitarian relation, such as its pervasiveness and its length. For this reason, Schemmel's theory of self-respect runs the risk of arbitrarily excluding some inegalitarian relations from the scope of those relations that undermine people's sense of self-respect.

Let us now turn to the second challenge. As we have seen, Schemmel argues that *robustness* is a constitutive feature of a functioning self-respect. A person has a functioning sense of self-respect when (i) they are aware that they are entitled to be considered and treated as an equal (standing self-respect) and able to formulate and carry out valuable projects (standards self-respect), and (ii) they are capable of retaining a sense of self-respect even under adversity. (i) and (ii) are two distinct dimensions: a person can have a high degree of self-respect, whereby they are convinced that they are entitled to equal treatment and that their talents and projects are valuable, yet their self-respect can be frail – it can be lost at the first injustice they are victims of.

Now, a person's sense of self-respect can be more or less robust. The degree of robustness, in turn, depends, *inter alia*, on the number of inegalitarian relationships an individual is part of. To see this, let us return to Katie. Assume that the inequality of social esteem in the workplace, taken individually, ought not undermine Katie's sense of self-respect. Having a functioning sense of self-respect, Katie retains confidence in her agential abilities even though she is ignored by the chair board and her colleagues. This, however, is compatible with holding that, as a result of the inequality of self-esteem in the workplace, Katie has a *less robust* sense of self-respect: this is because she would lose it – or at least it would be diminished – should she be a victim of other inegalitarian relations in other social contexts. For instance, imagine that Katie is not only ignored in the workplace, but that her husband also does not take her opinion seriously when discussing important issues (e.g., how to manage their finances). Being treated as unequal in different social contexts, Katie loses her sense of self-respect.

More generally, then, a person might stand in several inegalitarian relationships, each of which individually requires a significant effort to retain one's sense of self-respect; their cumulative effect is therefore to diminish the robustness of one's sense of self-respect by raising the probability of losing it. Put another way, it can be simultaneously true that (i) each individual inegalitarian relationship is fully resistible by a person without losing their sense of self-respect, and that (ii) a person's overall ability to retain their sense of self-respect is greatly diminished.

If this is true, we might still have some self-respect-based reasons to condemn those inegalitarian relations that, taken individually, ought not to weaken persons' sense of self-respect. First, one might hold that persons are entitled to an equal degree of robustness of self-respect, other things being equal. But, as we have seen, the more injustices one is a victim of, the less robust their sense of self-respect is. Hence, the wrongness of unequal relations consists in causing inequality of robustness of self-respect.

Second, one might note that inegalitarian relations render certain people especially vulnerable to losing their sense of self-respect. Thus, the wrongness of treating Katie as unequal in the workplace does not consist in undermining her sense of self-respect (which, *ex hypothesi*, is not diminished by this inequality of social esteem). Rather, it consists

in making Katie particularly vulnerable to losing it. This is because if Katie is also treated as unequal in other social contexts (e.g., within the family), then she might lose her sense of self-respect, or at least it might be reduced. Hence, the inegalitarian relation in the workplace increases the range of circumstances in which Katie will be unable to retain her sense of self-respect. And, a relational egalitarian society has compelling reasons not only to refrain from undermining a person's sense of self-respect but also to avoid rendering them particularly vulnerable to losing it.

To conclude, in this section, I have analysed Schemmel's theory of self-respect. First, I have suggested that it is not clear how such a theory can distinguish inegalitarian relations that undermine persons' sense of self-respect from those that do not in a non-arbitrary way. Second, I have argued that even if individual instances of inegalitarian relations ought not to weaken people's sense of self-respect, their cumulative effect might undermine their degree of robustness. This then generates self-respect-based reasons to condemn such relations.

Conclusion

In this discussion note, I have analysed two aspects of Schemmel's theory of relational equality: his critique of distributive views of equality and his account of self-respect. But *Justice and Egalitarian Relations* offers much more than this. It puts forward a coherent and compelling case for the ideal of relational equality: specifically, it elaborates a comprehensive and persuasive theory of justice that explains what it means to relate as equals and shows why this is of intrinsic and fundamental moral importance. Anyone working on egalitarian justice, in particular, and political philosophy, more generally, will greatly benefit from reading *Justice and Egalitarian Relations*.

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