

## **Equity and Social Justice: A short introduction**

By: Equity for Children || June 2013

This introduction provides a snapshot of some central theories that are linked to the present debate on the relation of equity and equality to development. We cover only a small part of the extensive literature and debate and it is a work in progress, subject to new contributions and changes. The objective is to provide a framework to the different elements that Equity for Children is presenting on the concepts of ‘equality’ and ‘equity’ and implications for children and adolescent policy actions.

### Equity

There is consensus in the development literature that an equity approach signifies development aimed at reaching the most marginalized and deprived populations first, in contrast to the objective of reaching only greater quantities of people. Key international organizations like the World Bank and UNICEF utilize the concept of equity prominently in their work and refer to it explicitly in their reports and strategies. The first high profile occurrence of the equity concept on the international organizations’ arena appeared with the publishing of the UNDP’s 2005 Human Development Report, the 2005 Report on The World Social Situation by UNRSID, and the World Bank’s 2006 World Development Report. Anderson and O’Neil noted this trend with the release of working papers entitled “A New Equity Agenda” as a primer to a conference held by the Overseas Development Institute (ODI) on the topic. This discussion dealt with the concept of equity both in terms of its intrinsic as well as its instrumental value. While intrinsically

perceived as ensuring the human rights of the most deprived, the instrumental view presents equity as an instrument for growth and social cohesion.

Overall, equity is not a new concept to development work. Some view the equity approach as a response to growing inequalities and a way to address those left out of the “low-hanging fruit” approach for which the Millennium Development Goals (MDGs) are sometimes criticized. The current dialogue around equity revolves predominantly around how equity is measured. One camp holds that increasing equality of opportunity, or equal access to services, is enough. Others argue that equity should be measured according to outcomes, or the results of how groups of people actually fare in life. Either way, an equity approach entails addressing the specific deprivations of the most marginalized in societies.

The genesis of equality and equity as a concept of social justice arose from a history of evolving philosophies of societal organization and distribution of wealth and services. From natural law to the modern concept of rights, the pursuit of a socially just distribution continues. Poverty exists at record-high levels in absolute terms, disproportionately affecting the most marginalized groups in societies across the world. The central theories underlying the equity paradigm follow, providing a theoretical background for the concept of equity and its relevance in today’s highly unequal world. While there are many social justice theories, the four contemporary frameworks relating to equity in this examination are John Rawls’ concept of *justice as fairness* (1971), Amartya Sen’s *capability approach* (2000), Charles Tilly’s concept of *durable inequalities* (2006), and the *human rights approach to poverty* by The Office of the High Commissioner for Human Rights (OHCHR) (2002). We examine each of these below.

## Major Works contributing to Equity

John Rawls' *A Theory of Justice* (1971) underlies the principle approach to alleviating inequity by targeting the most disadvantaged. Amartya Sen's *The Idea of Justice and the capability approach* support the focus of poverty alleviation on the specific and individualized needs of the disadvantaged. This is to say that services need not be prioritized in the most central manner possible, but rather the most effective for the most disadvantaged, based on that demographic's particular needs and capabilities. One area of consensus regarding inequity is that it arises from overlapping deprivations which create multi-dimensional poverty.

Charles Tilly's concept of durable inequalities relates to the transmission of poverty that persists through generations, providing a central concept with respect to equity. Tilly theorizes the social aspect of poverty by examining how social status is preserved via commonly unintentional social ties in *Identities Boundaries & Social Ties* (2006). Human Rights are reflected in The Office of the High Commissioner for Human Rights (OHCHR) *Human Rights and Poverty Reduction: Conceptual Framework* (2002).

## Contemporary Frameworks Relating to Equity

### 1. Justice as Fairness

John Rawls' seminal *A Theory of Justice* introduces the concept of "justice as fairness", shifting the philosophy of distribution to the greater society instead of individuals. Rawls presents two central principles to comprise his philosophy. The *equal liberty principle* holds that individuals are entitled to the maximum amount of liberties (to vote and run for office, freedom of speech and assembly, liberty of conscience, freedom of personal property and freedom from arbitrary arrest) to the extent that it is good for the society as a whole and that can be applied to

all. The *difference principle* holds that inequalities are acceptable only if they are redressed to the greatest benefit of the most disadvantaged. Rawls' treatment of inequalities shares a fundamental value with the concept of equity in that they both aim to redress inherent disadvantages in terms of opportunity and social mobility (Rawls 302).

The equity paradigm derives the concept of a fair equality of opportunity from Rawls second principle. The *difference principle* then does allow for inequalities in outcomes to the extent that equality of opportunity exists. Rawls claims "undeserved inequalities call for redress; and since inequalities of birth and natural endowment are undeserved, these inequalities are somehow to be compensated for" (Rawls 100). In Rawls' view, individuals living in a society must commit to viewing one another as free and equal unlike the distributional schemas of classical liberalism, neo-liberalism, and libertarianism. Under the social equity paradigm in the development context, this implies that a greater priority be placed on the most disadvantaged to meet their unique needs.

## 2. Capabilities

Amartya Sen's theory of *the capabilities approach* draws on Rawls' depiction of social justice and describes poverty as being multi-faceted, beyond income levels. Sen maintains that each individual is born with unique capabilities based on many factors and is also faced with multi-faceted barriers. Sen holds that inborn capabilities, or an individual's capacity to reach their full potential, are not necessarily met with opportunity which would allow an individual to realize that capability. Viewing development as freedom, Sen supports development as a vehicle to bring the uniquely specific opportunities needed to address the unique needs of the impoverished. Sen believes that by recognizing the capability of an individual, barriers to

development can be overcome. He also connects the multidimensional disadvantages as contributing factors to inequity.

### 3. Determinant Factors of Inequity and Durable Inequalities

Charles Tilly's concept of durable inequalities maintains that categorical inequalities exist via exploitation and opportunity hoarding. These asymmetrical relations between groups keep the disadvantaged bound to one tract and the privileged poised to continue reaping the benefits of their social resources. Whether consciously or not, people's position on the social mobility ladder is largely fixed as a result and this perpetuates inter-generational cycles of poverty. These are relational mechanisms that sustain unequal advantage and amount to opportunity hoarding for the privileged group. The position an individual is born into hinges primarily on "unequal control over value-producing resources" (Tilly 104). In other words, the most advantaged tend to own modes of production. Tilly names emulation through generations and adaptation as two forms of coping by subordinated groups that result in further isolation of the disadvantaged. Tilly's work provides a central theoretical framework for understanding why inequality and inequity exist and persist.

### 4. Human Rights Approach to Poverty

The human rights approach to poverty, officially explained in OCHCHR's conceptual framework, draws on Sen's capability approach to empower the disadvantaged. Like the other conceptual frameworks, the human rights approach to poverty takes a multidimensional view, capturing not just income deprivations but also horizontal inequalities that lead to exclusion of particular groups. OCHCHR also expresses a concern for outcomes over opportunities noting the

“importance of looking at effects, not intentions” (Human Rights and Poverty Reduction 18). Overall the human rights approach to poverty means a universal approach to addressing deprivations that depend on local and country contexts.

## An Ongoing Debate

When we talk about equity we discuss the way in which wealth is distributed and how needs are assessed and addressed. One overarching recommendation from international development organizations is to disaggregate poverty measures to avoid national averages that overstate advancements such as the MDGs. While national averages may improve, in many cases growing disparities continue to threaten development advancements as well as economic growth.

The current assessment of development suggests a shift from a focus on income poverty (or vertical inequalities which focus on monetary income) to horizontal inequalities which take stock of access to resources in the political, social and cultural realm. Discrimination against groups based on ethnicity, religion, location, and gender are consistently cited as determinant factors in creating barriers to services. Philosophers such as Richard Arneson argue that equality of opportunities underlie the concept of equity. This means that the worst off people should be prioritized and be given extra weight in the distribution of goods and services. “Prioritarianism” as it is coined by Arneson, is complemented by the concept of the “level playing field” idea promoted by Ronald Dworkin and John Roemer. This concept holds that society should strive to provide services for those people that are excluded from candidate pools for jobs, to equalize or “level the playing field”.

The literature on equity clearly and consistently identifies the overlapping nature of these deprivations that sustain, reinforce, and exacerbate poverty. Equity aims to address this dynamic

through targeted action for the most disadvantaged groups. Equity is concerned with fairness and social justice and aims to focus on a concern for people's needs, instead of providing services that reach the greatest number of people. The equity paradigm promotes investing in the transmission of services to people who need them most.

The debate on equity and social justice, on equality and inequalities is ongoing. It will have an impact on socio-economic policies and on the definition of the Post-Millennium Development Agenda.

## **References**

Charles Tilly. 2006. Identities, Boundaries and Social Ties.

John Rawls. 1971. A Theory of Justice. Harvard University Press.

Amartya Sen. 2000. The Idea of Justice.

John E. Roemer. 2009. Equality of Opportunity. Harvard University Press.

Dworkin, Ronald. 2000. Sovereign Virtue. Harvard University Press.

Richard Arneson. 2002. The Level Playing Field Conception. Stanford University.

Edward Anderson and Tammie O'Neil. 2006. ODI Working Papers. A New Equity Agenda?