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A PHILOSOPHICAL ANALYSIS OF THE IMPACT OF SOCIAL INEQUALITY ON THE DEVELOPMENT OF CONTEMPORARY SOCIETY

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Abstract. The article offers a philosophical analysis of the influence exerted by social inequality upon the development of contemporary society. The author proceeds from the thesis that the question commonly posed in public and academic discourse — whether inequality helps or harms development — is malformed, since it conflates three analytically distinct questions concerning the dimension in which equality is assessed, the conception of development presupposed, and the mechanism through which the one acts upon the other. Employing the dialectical, comparative-analytical, hermeneutic and axiological methods, the study disaggregates these questions and demonstrates that the effect of inequality upon development is not a function of its magnitude alone. The decisive variables are shown to be the origin of an inequality, the reversibility of the positions it establishes, and its convertibility across the distinct spheres of social life — above all the conversion of economic advantage into political power, which renders inequality self-reinforcing by disabling the very institutions capable of correcting it. The positions of J. Rawls, A. Sen, R. Nozick, H. Frankfurt, T. Piketty and the empirical generalisations of R. Wilkinson and K. Pickett are examined, including the arguments that tell against the author’s own conclusions. The concluding propositions substantiate the role of education as the institution that determines the reversibility of social positions.

Keywords: social inequality, social development, justice, equality of what, capability approach, difference principle, sufficiency doctrine, reversibility of positions, convertibility of capital, political capture, social cohesion, human development.

INTRODUCTION

Few questions in contemporary social thought are posed as frequently, and answered as confidently, as the question of whether social inequality assists or impedes the development of society. The confidence of the answers given on either side stands in inverse proportion to the clarity of the question itself. Advocates of the first position invoke incentives, the reward of effort and the accumulation of capital; advocates of the second invoke wasted talent, social fragmentation and the erosion of trust. Both cite empirical material; both can point to historical cases that confirm them. Where two bodies of evidence support opposite conclusions with equal apparent force, the difficulty generally lies not in the evidence but in the formulation of the question, and the task of philosophical analysis consists in demonstrating precisely where the formulation fails. The failure, in the present case, consists in the conflation of three analytically independent questions within a single interrogative form. The first concerns the dimension in which equality is to be assessed: inequality of income, of wealth, of opportunity, of capability, of recognition and of political voice do not coincide, and a society may compress one while expanding another. The second concerns the conception of development presupposed: aggregate economic growth, human development, institutional stability and cultural flourishing are distinct criteria that may diverge sharply in their assessment of the same trajectory. The third

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concerns the mechanism by which the one is supposed to act upon the other, for a correlation between inequality and any developmental indicator says nothing whatever about the pathway connecting them. Until these three are separated, the dispute cannot be settled, because the participants are not discussing the same proposition. The first of the three questions was given its classical formulation by A. Sen, who demonstrated that every normative theory of social arrangement is egalitarian in some dimension and that the real disagreement between competing theories concerns not whether equality matters but the space in which it is to be measured. The choice of this informational basis is not technical: it determines in advance which situations will count as unjust and which as unobjectionable, and theories that appear irreconcilable frequently differ only in the variable they have selected [9, p. 12–30]. For the analysis of development this yields an immediate consequence: a society may reduce income dispersion while leaving the distribution of real freedoms untouched, and an improvement registered in one space may conceal deterioration in another. The conception of development itself has undergone a comparable reformulation. Where the measurement of social progress was long identified with the growth of aggregate output, Sen advanced the position that development should be understood as the expansion of the substantive freedoms that people enjoy — that income and wealth are instrumentally valuable but are not what development consists in, and that the removal of unfreedoms such as poverty, tyranny, the neglect of public facilities and the denial of political voice constitutes its proper content [8, p. 3–34]. The significance of this reformulation for the present inquiry is methodological rather than rhetorical: an aggregate indicator is by construction indifferent to distribution, so that a measure of development which averages across a population cannot register the effect of inequality upon it, and the apparent neutrality of such a measure is in fact a prior decision to disregard the variable under investigation. The empirical material bearing upon the third question has accumulated considerably over the past two decades. R. Wilkinson and K. Pickett assembled comparative evidence indicating that among the wealthier societies the level of internal income dispersion predicts the prevalence of a range of health and social problems more reliably than the average level of income, and they attributed this regularity to the psychosocial consequences of status differentiation rather than to material deprivation as such [10, p. 15–30]. T. Piketty, for his part, advanced the proposition that when the return on capital persistently exceeds the rate of economic growth, inherited wealth accumulates faster than output, so that the compression of inequality observed in the mid-twentieth century should be regarded as the exception produced by catastrophe and policy rather than as the normal tendency of market economies [6, p. 25–27]. These findings do not, however, settle the philosophical question, and the attempt to treat them as though they did constitutes the principal defect of the literature advocating redistribution. Two serious objections stand against any inference from such correlations to a normative conclusion. R. Nozick argued that justice in holdings is historical rather than patterned: if a distribution arises through legitimate acquisition and voluntary transfer, it is just irrespective of the shape it assumes, and the maintenance of any preferred pattern requires continuous interference with the choices through which people dispose of what is theirs [5, p. 149–164]. H. Frankfurt advanced an independent objection, maintaining that what possesses moral importance is not that everyone should have the same but that

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everyone should have enough, and that the doctrine of equality distracts attention from sufficiency while encouraging people to define their needs by comparison with others rather than by what their own lives require [3, p. 21–34]. These objections must be confronted rather than circumvented, and a position that cannot accommodate them is not philosophically serious. It is nevertheless possible to show that the force of both is conditional upon an assumption that does not hold in the societies under discussion: the assumption that economic advantage remains confined to the economic sphere. Where it does not — where wealth purchases political influence, and political influence in turn rewrites the rules of acquisition — the historical entitlement argument loses its premise, since the transfers in question are no longer voluntary in the required sense, and the sufficiency doctrine loses its sufficiency, since the threshold below which no one should fall is itself set by a political process that the inequality in question has captured. The problem possesses a particular configuration in societies undergoing rapid transformation, where the structures of distribution are being reconstituted and where the institutions responsible for the reversibility of social positions — above all the system of education — are themselves under reform [4, p. 325–328]. The formation of the worldview through which young people interpret their own position in the social order is accomplished within the system of continuous education, and this formation determines whether an existing inequality is experienced as a condition to be overcome through effort or as a verdict already delivered [1, p. 314–316; 2, p. 10–13]. The aim of the present article consists in the philosophical analysis of the influence of social inequality upon social development through the disaggregation of the question and the identification of the mechanisms involved. The novelty of the work lies in the demonstration that the philosophically relevant variable is not the magnitude of an inequality but its origin, its reversibility and its convertibility across spheres.

The study rests upon the dialectical method, which permits inequality to be apprehended not as a simple quantity admitting of more or less but as a contradictory relation whose developmental effects depend upon the form in which it is reproduced. The comparative-analytical method has been applied to the principal normative theories of distributive justice in order to establish the point at which their disagreement is genuine and the point at which it is merely terminological. The hermeneutic approach has served to reconstruct the understandings that participants in a social order attach to their own position within it, since the effects of inequality are mediated by its interpretation. The axiological approach has been used to identify the value premises underlying the competing conceptions of development. The material of the investigation comprises the classical works of contemporary political philosophy on justice and equality, the economic literature on the dynamics of capital accumulation, and the comparative empirical generalisations concerning the social consequences of income dispersion.

The first result establishes that the effect of inequality upon development cannot be a monotonic function of its magnitude. If it were, societies with similar coefficients of dispersion would display similar developmental trajectories, which they demonstrably do not. Two societies may exhibit an identical distribution of income while differing entirely in the degree to which positions within that distribution are inherited, in the extent to which economic position determines access to education, health and justice, and in the degree to which the distribution is regarded by those

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who occupy its lower positions as the outcome of a defensible process. These three differences are invisible to the coefficient, and it is precisely they that determine the developmental consequence. The magnitude of an inequality is thus a description of its surface; its causal properties lie in its structure. The second result specifies the first of the structural variables, namely the origin of an inequality. J. Rawls constructed his theory upon the proposition that the natural distribution of talents and the circumstances of birth are morally arbitrary — nobody deserves the family, the endowments or the social position into which he is born — and that inequalities are therefore justifiable only insofar as they operate to the greatest benefit of the least advantaged, under conditions of fair equality of opportunity [7, p. 100–108]. The philosophical force of this argument lies not in the redistributive conclusion many draw from it but in the distinction it establishes: an inequality that tracks differential contribution stands in a different relation to social development from one that tracks differential inheritance, because the first rewards an activity the society has reason to encourage while the second rewards nothing at all. A society in which the two are confused loses the incentive argument without gaining the equality .The third result concerns reversibility, which is the variable most frequently omitted from the dispute. A distribution describes the positions available; reversibility describes the probability of movement between them within a lifetime or between generations. Its developmental significance is twofold. In the allocative dimension, low reversibility entails that capacity is distributed independently of the position in which it occurs while opportunity is not, so that a substantial portion of a society's talent is never developed — a loss that no incentive at the upper end compensates. In the legitimating dimension, reversibility determines the meaning that those occupying lower positions attach to their situation: where movement is possible, inequality is experienced as a gradient; where it is not, it is experienced as a caste, and the resulting withdrawal of consent affects every institution that depends upon voluntary compliance. The fourth result identifies convertibility as the decisive variable, and in it the self-reinforcing character of inequality originates. A differentiated society contains several spheres — the economic, the political, the juridical, the educational — each of which possesses, in principle, its own criterion of distribution: productivity in one, citizenship in the second, the merits of a case in the third, capacity and effort in the fourth. Inequality becomes developmentally destructive at the point at which advantage in the first sphere becomes purchasable advantage in the others. The conversion of economic into political power is the gravest instance, because the political sphere is the one in which the rules governing all the others are determined: an economic elite with disproportionate political influence will rewrite the rules of acquisition in its own favour, and the inequality thereby acquires the capacity to disable the mechanisms by which a society might otherwise correct it. This is the point at which the historical-entitlement defence collapses, since the transfers in question cease to be voluntary, and the sufficiency doctrine collapses with it, since the threshold of sufficiency is set by a captured process. The fifth result concerns the mechanism through which inequality affects the non-material dimensions of development. The comparative evidence associating income dispersion with health and social outcomes is frequently interpreted as an effect of material deprivation, but this interpretation is inconsistent with the data, since the association holds among societies in which the absolute standard of living at the lower end is historically high.

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The more plausible interpretation is relational: in a steeply stratified society the interactions of ordinary life carry a continuous evaluative content, status anxiety becomes chronic, and the generalised trust upon which cooperation, contract enforcement and collective action depend is eroded. Development understood as the expansion of freedoms is thereby impaired independently of any effect upon output, and a society may grow wealthier while its members become less free in the dimensions that matter to them. The sixth result concerns an objection that is raised against the foregoing with some regularity, namely that the whole analysis may be dispensed with by the simple distinction between inequality of opportunity, which is held to be unjust, and inequality of outcome, which is held to be acceptable provided the former has been eliminated. The distinction is indispensable, but it cannot bear the weight placed upon it, because the two terms are not independent across time. The outcomes of one generation constitute the opportunities of the next: the income, the residence, the connections and the cultural resources that a family has obtained determine the school a child attends, the expectations formed in him and the networks through which his first position is secured. A society that undertakes to equalise opportunity while remaining wholly indifferent to outcomes has therefore undertaken a task that its own indifference renders impossible, since the inequality of outcome it permits reconstitutes, in the following generation, precisely the inequality of opportunity it proposed to abolish. This is not an argument for equalising outcomes; it is an argument that the magnitude of outcome inequality which a society may tolerate is determined by the strength of the institutions that interrupt its transmission. The seventh result draws the preceding together into a position that accommodates the objections raised in the introduction. The incentive argument retains its force for inequalities that are earned, reversible and confined to their sphere of origin; it has no force for inequalities that are inherited, entrenched and convertible, since these reward nothing and discourage nothing. The sufficiency doctrine retains its force wherever the threshold is set by a political process that the distribution has not captured; where it has, the appeal to sufficiency becomes a defence of whatever threshold the advantaged have found it convenient to concede. The conclusion is therefore not that equality is to be maximised but that the relevant object of social policy is the structure rather than the magnitude of inequality: the institutions that preserve reversibility and the boundaries that prevent conversion between spheres. Education occupies the central position in both, since it is simultaneously the principal mechanism of reversibility and the sphere whose capture most reliably destroys it.

CONCLUSION

The analysis undertaken permits the following conclusions. First, the question whether social inequality assists or impedes development admits of no answer in the form in which it is ordinarily posed, since it conflates the dimension in which equality is assessed, the conception of development presupposed and the mechanism connecting them. The persistence of the dispute, and the capacity of each side to adduce evidence, is a consequence of this conflation rather than of the complexity of the subject matter. Second, the effect of inequality upon development is not a function of its magnitude. Distributions of identical shape produce divergent trajectories according to their origin, their reversibility and their convertibility across spheres, and these three variables are invisible to the aggregate measures upon which the public discussion relies. An analysis that proceeds from the coefficient alone is therefore

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examining the surface of the phenomenon rather than its causal structure. Third, convertibility is the decisive variable, and the conversion of economic advantage into political power is its gravest form. Inequality acquires at this point the capacity to disable the institutions through which a society might correct it, and it is precisely here that the principal philosophical defences of unequal distribution — the historical entitlement argument and the doctrine of sufficiency — lose the premises upon which their validity depends. Fourth, the developmental damage inflicted by inequality is not exhausted by its material consequences. In the relational dimension, steep stratification erodes the generalised trust upon which cooperation and collective action rest, so that a society may register growth in output while contracting in the freedoms that constitute development in the substantive sense. Fifth, it follows that the proper object of social policy is the structure rather than the magnitude of inequality: the institutions that preserve the reversibility of positions and the boundaries that prevent advantage in one sphere from being converted into advantage in another. Education occupies the central place in this structure, and its accessibility is therefore not a question of social welfare alone but a condition of the developmental capacity of the society as a whole. The prospect of further research consists in the elaboration of empirically applicable indicators of reversibility and convertibility for societies undergoing structural transformation.

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