

# What is Equality?

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Hidehiko Adachi

## 1. Introduction

In this report, I will address the question: What is equality? The concept of equality is highly controversial, largely because it is extremely vague. A vague concept can encompass a wide range of meanings. Those who use such a concept often assume—without realizing it—that others share their understanding of what equality means. However, this assumption is an illusion. In many cases, one person's understanding of equality differs from another's. When such differences arise, discussions can devolve into arguments based on one-sided claims, leaving neither side able to understand why the other does not see their point of view. As a result, both parties may give up on trying to persuade the other.

To avoid such an outcome and to facilitate constructive discussions, participants must first clarify their own understanding of equality, explicitly identify points of disagreement, and strive to articulate these differences. Only through such efforts can genuine agreement be achieved.

The concept of equality has been explored by Western thinkers since ancient Greece. However, this does not mean that equality is important only in the West. I am Japanese and live in a Japanese cultural context. Buddhism, introduced to Japan from China and Korea between the 5th and 8th centuries AD, has greatly influenced Japanese society. Originating in India around the 6th century BC, Buddhism arose in part as a critique of the rigid class system of the time—a system that still persists in some forms today. From its inception, Buddhism carried the belief that all people should be equal, regardless of birth. The spread of Buddhism, especially in East Asia, including Japan, highlights the enduring power of the concept of equality.

However, when it comes to the analysis of equality, Western thought has produced more comprehensive results than its Eastern counterpart. For this reason, my discussion here is based entirely on the analysis of equality within the tradition of Western thought.

## 2. Simple Equality and Proportional Equality

Classifying a concept can lead to a deeper understanding of it. Below, I introduce some key classifications of equality. First, I explain the distinction between simple equality and proportional equality<sup>1</sup>.

### 2.1. Simple Equality (Narrow Sense of Equality)

Simple equality refers to the idea that every person or group possesses the same quantity or quality of something. This ‘something’ could include income, assets, health, happiness, utility, welfare, capability, rights, freedom, opportunity, security, life, or dignity. Equality in this sense is also called absolute equality or arithmetic equality. For example, if two workers have different working hours or levels of contribution but are paid the same amount, they are treated equally in the sense of simple equality. However, such treatment may conflict with proportional equality, which I will discuss shortly.

Aristotle referred to simple equality as arithmetical equality in his ‘Nicomachean Ethics’. He described the process of restoring a state of arithmetical equality where it has been lost—i.e., correcting inequality—as corrective justice.

Aristotle further divided corrective justice into two types, depending on whether the transaction in question was voluntary or involuntary. Voluntary transactions include sales, purchases, lending, and renting. Involuntary transactions include theft, poisoning, slave kidnapping, and assassination (conducted secretly), as well as acts like assault, confinement, murder, and robbery (conducted openly).

Aristotle’s corrective justice can be interpreted as requiring that the benefits or disadvantages exchanged between two parties be equal. For this reason, some have referred to it as ‘commutative justice’, a term that seems to date back to Thomas Aquinas’s commentaries on Aristotle. However, I believe Aristotle’s primary focus was not on the exchange itself but on restoring an unequal situation to one of equality (in the sense of simple equality). For this reason, I find Aristotle’s term corrective justice more fitting. For example, if inequality arises between two individuals because one gains an advantage while the other suffers a loss, the person with more should restore equality by transferring half the difference to the person with less.

### 2.2. Proportional Equality

The opposite of simple equality is proportional equality. Proportional equality means that one quantity is proportional to another, and it is also called relative equality. For

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<sup>1</sup> The following explanation is based on ‘What is Equality?’ by Satoshi Niimura, in Satoshi Niimura and Koichi Tagami (eds.), *An Introduction to the Philosophy of Equality* (Shakai Hyoronsha, 2021), pp. 15-22.

instance, if two workers (a and b) work for different numbers of hours (a and b hours, respectively) and are paid different wages (A and B dollars, respectively), their pay is proportionally equal if the ratios of hours worked to wages earned are the same: (a:b = A:B).

If two workers are paid the same amount despite differing hours worked, this constitutes simple equality but not proportional equality. Conversely, if their pay is proportional to their hours worked, this constitutes proportional equality but not simple equality.

Both simple equality and proportional equality are subcategories of equality. Summarizing the above, we can state the following:

$$\text{Equality (broad sense)} = \text{Simple Equality} + \text{Proportional Equality}$$

For clarity, it may be helpful to use distinct terms:

‘Fairness’ for equality in the broad sense,

‘Equality’ for simple equality, and

‘Equity’ for proportional equality.

### 2.3. The Relationship Between Simple Equality and Proportional Equality

Proportional equality involves treating people in proportion to specific attributes they possess (e.g., hours worked). This implies that individuals who are equal with respect to a given attribute should be treated equally. For instance, if wages are determined by hours worked, two workers with the same number of hours should receive the same pay. In such cases, wage payments reflect both proportional equality and simple equality.

In other words, simple equality is a special case of proportional equality, meaning proportional equality implies simple equality. Nevertheless, because simple equality remains an important principle (e.g., in Aristotle’s corrective justice), the distinction between the two should be preserved. Accordingly, we can redefine the equation as follows:

$$\text{Equality (broad sense)} = \text{Proportional Equality (excluding Simple Equality)} + \text{Simple Equality.}$$

In the following discussion, the term proportional equality will exclude simple equality.

### 3. What Attributes Should We Focus On?

People differ in many attributes, yet they are the same in some others. Proportional equality focuses on individual attributes and seeks to treat people in proportion to the quantity or quality of those attributes. However, it does not specify which attributes should be used as the standard. The choice of standard depends on what is being distributed and has traditionally been considered a matter of distributive justice rather than equality itself.

Historically, proportional equality was emphasized when distributing rights and freedoms in ancient and medieval times. Since the modern era, however, simple equality has been the dominant principle, based on the idea that all people are fundamentally equal. In economic contexts, proportional equality is often required—for instance, in income, social security, taxation, and insurance contributions. Yet, arguments emphasizing the importance of ensuring everyone has basic capabilities, such as Amartya Sen's capability approach, often invoke simple equality.

There are four principles commonly used to classify the attributes that guide distribution:<sup>2</sup>

- (1) The Contribution Principle (benefits proportional to contributions)
- (2) The Need Principle (benefits proportional to needs)
- (3) The Benefit Principle (burdens proportional to benefits received)
- (4) The Ability Principle (burdens proportional to the ability to pay)

Examples of the Contribution Principle include wages proportional to work performed, profits proportional to capital invested, and insurance benefits proportional to contributions paid. The Need Principle applies to welfare benefits, such as family allowances, commuting expenses, public assistance, and child allowances. The Benefit Principle and Ability Principle are often applied to taxation and social insurance.

These four principles can be categorized in two ways:

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<sup>2</sup> Niimura, p.19.

#### 1. Benefit vs. Burden Principles:

Principles (1) and (2) concern benefits, while (3) and (4) concern burdens. In practice, a sustainable system must encompass both benefits and burdens.

#### 2. Market vs. Non-Market Principles:

Principles (1) and (3) are market-based (or exchange-based), reflecting give-and-take relationships. Principles (2) and (4), on the other hand, are non-market-based and rooted in mutual assistance within a community. These could be called assistance principles.

A distribution system based solely on market principles tends to widen disparities among people. For this reason, many believe assistance principles must also be incorporated. For example, low-income earners should receive support to address income shortfalls (the Need Principle), while high-income earners, who are more capable, should contribute more (the Ability Principle).

In modern societies, market exchanges coexist with non-market structures, such as families, communities, governments, and international organizations. Therefore, any practical distribution system must combine both market and assistance principles.

Designing a fair and effective distribution system is a complex task that requires balancing these principles. Advocates for reform must clearly identify which principle underpins their proposals and how it aligns with the goals of the system.

#### 4. Conclusion

While achieving complete agreement on a just society may be challenging, clarifying the concept of equality can reveal areas of common ground. Even partial consensus can pave the way for progress, offering hope for a more equitable future.

ADACHI, Hidehiko

Kanazawa University, Japan

hadachi@staff.kanazawa-u.ac.jp