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Article

# The Metaphysics of Equality: Unpacking Its Philosophical Ambiguities

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**Abstract:** The concept of equality is one of the fundamental ideals of human society. We cannot deny the importance of the principle of equality in shaping our ideas and thoughts to establish an egalitarian society. Throughout history, it has guided human societies in creating a just and welfare state—a society in which every individual would be treated with equal dignity and respect. The assertion is that each individual on this earth is born equal and free and has the freedom to do whatever he or she wishes. In other words, the primary aim of the ideal of equality is to establish a just and egalitarian society by ensuring equal dignity, respect, and liberty for each individual. However, the concept of equality has various meanings and alternatives. Depending on individual requirements, the nature and meaning of equality also vary. As a result, significant ambiguity remains around key questions such as: What does equality essentially mean? What does it mean to say that all people are created equal? What justifies treating everyone equally? What kinds of relationships does equality refer to? What are the scope and limitations of equality? Some argue that the idea of social equality is inherently problematic. It makes people and society unenthusiastic. Further, equality is the infringement of one's liberty, right to possess property, and freedom to live as one pleases. Therefore, this paper attempts to examine the conceptual foundation and meaning of equality.

**Keywords**: Equality; Dignity; Respect; Freedom; Egalitarianism; Just Society











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#### Introduction

The concept of equality lies at the heart of normative political thought and stands as one of the greatest ideals in political philosophy. Almost every nation embraces this ideal for reconstructing its internal structure. More precisely, it is a tremendous social, political, and moral ideal towards a welfare state. Given the moral sameness of each individual, equality represents a moral virtue to rational beings. Within a societal context, it works as an instrument for social transformation and change, aiming to establish a just and egalitarian society by ensuring the legal, moral, social, political, and economic equality of individuals. As a political ideal, equality functions as a guiding principle of human society. It is believed that as rational beings, each individual deserves equal worth regardless of any differences that exist in society. As a social ideal, equality regards each individual as an equal potential being and advocates for equal opportunities to achieve their potential and self-development.

Although the contemporary world widely acknowledges the importance of equality for the constructive development of society, its true meaning remains unclear and is sometimes misunderstood and misinterpreted. It is a very contested concept. Philosophers continue to struggle to provide a comprehensive definition of equality due to its multifaceted aspects and meaning. As Baker states, equality is a very complex ideal that cannot be defined in a single satisfactory definition (Baker, 1987). Sometimes it is concerned with the material aspects of existence, i.e., the distribution of resources, and often it has to do with values, like progressive beliefs. Just as in existentialism, the concept of freedom is understood from various perspectives, including birth, place, and environment. Similarly, the idea of equality must also be interpreted in light of different circumstances. Thus, this paper attempts to examine the conceptual foundation and meaning of equality.

#### **Principles and Perspectives of Equality**

The idea of equality is both a concept and a conception. Concept and conception are frequently used interchangeably, as both terms derive from the same Latin word 'concipere.' The concept emphasises the structure or grammar of a specific term, whereas 'conception' refers to various perspectives of that concept. Concept is a mental abstraction, and conception involves the realisation of the concept properly. However, as a concept, equality refers to the equal treatment of each individual, regardless of any differences. Equality is not restricted to this specific grammatical meaning; instead, it involves a wide range of perspectives, including equality of resources, equality of opportunity, equality of access, etc. These denote the different conceptions of equality, and they all work together to comprehend the ambiguity in equality.

There are also descriptive and normative aspects of equality. From the descriptive perspective, it compares things based on quality or quantity by observing the facts among entities. It examines the relationships between two or more entities, focusing on similarities that may exist in at least one or more but not all aspects. Although no two objects in this world are exactly alike, we can infer the identity or likeness of two things by observing similarities in certain aspects. As Westen asserts,

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"No single thing, standing alone, can be either equal or unequal. To say a thing is equal or unequal is to say it is equal or unequal to something that is, to something else" (Westen, 1983, p. 607). On the other hand, equality is also a normative concept, sometimes referred to as a prescriptive concept. A normative concept consists of standard moral values and norms. As a normative concept, equality refers to specific norms to establish equal conditions among individuals. Since a prescriptive conclusion is drawn from the descriptive comparison, equality is also a prescriptive term. In equality, a universal standard or guideline is applied to every individual. As Westen remarks, "to say two people are prescriptively equal means they are identical by reference to a given normative standard that measures (or prescribes) the way the people should be treated" (Westen, 1983, p. 617).

Philosophers often referred to equality as impartiality. As an ideal of impartiality, equality holds the idea that no individual is intrinsically more valuable than another. According to Nagel, impartiality has distributive consequences similar to egalitarianism. In his view, impartiality creates a stronger desire to benefit the worse off than the better off, a sort of preference for the former over the latter (Nagel, 1991, p. 66). However, there is disagreement regarding the impartial nature of the idea of equality. From the perspective of impartiality, it is claimed that no individual is more valuable than another; indeed, it would be hard to find any excuse to attribute something to a person who deserves recognition for their merit. It is an undeniable fact that some people are more deserving than others in at least one or many respects. Moreover, although both a farmer and a scientist, as human beings, are entitled to equal respect and dignity, a social hierarchy must be maintained for the sake of societal stability and harmony.

The Stanford Encyclopedia of Philosophy, in an article on equality, untangles the concept by outlining its four principles, namely, formal equality, moral equality, proportional equality, and presumptive equality. In his article, "The Principle and the Presumption of Equality," Stefan Gosepath also discussed the above-mentioned principles of equality (Stefan, 2014, p. 166). Aristotle was the proponent of formal equality. The fundamental dictum of formal equality is: To treat like cases alike. He also classified equality into two categories: numerical equality and proportional equality. These two types of equality focus on two different ideas: distribution and treatment. Treating individuals indistinguishably, that is, treating each individual in the same manner, or giving something to each individual in the same amount, is the essence of numerical equality. In contrast, proportional equality is a kind of relative equality. According to Aristotle, proportional equality refers to the proper allocation of something between equal or unequal individuals. Proportional equality is a particular way to express formal equality.

Moral equality is one of the most well-recognised ideas of equality. It denotes a kind of natural equality of human beings. Earlier, it was asserted that human beings are naturally unequal. However, from the seventeenth century, during the time of Locke, Hobbes, and Rousseau, this perspective shifted, and it began to assert that all human beings are born free and naturally equal. The thinkers claimed that each individual is

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descended from nature; they are all naturally in the state of absolute liberty and equality, and therefore, everyone deserves equal dignity and respect. However, the most common assertion regarding moral equality is that despite the "descriptive differences in certain relevant respects, all persons should be regarded and treated as moral equals, so that they are essentially entitled to the same basic moral rights and duties" (Stefan, 2014, p. 170). In other words, the descriptive disparities between people in certain pertinent aspects must not be taken into consideration. Regarding moral equality, Ronald Dworkin asserts that human beings ought to be treated equally simply because of their status as persons. This idea of equality was primarily prevalent in Stoicism and Christianity. Stoics believed that all rational creatures were equal, while Christianity established a direct relationship between humans and one single God.

Another dimension, the presumption of equality, was first introduced by Hugo Bedau. The fundamental idea behind this aspect of equality is that "people ought to be treated equally until reasons are shown for treating them unequally" (Westen, 2014, p. 230). Isaiah Berlin, in his essay, *Equality*, provides the following explanation of the presumption of equality dictum: "The assumption is that equality needs no reasons, only inequality does so; that uniformity, regularity, similarity, symmetry, need not be specially accounted for, whereas differences, unsystematic behaviour, change in conduct, need explanation and, as a rule justification" (Berlin, 1978, p. 146). Presumptive equality is closely tied to morality and is grounded in political justice. It involves the idea that justice must be impartially justified to encourage equitable allocation of public goods to everyone. Hugo Bedau argues that although social inequalities require some justification, equality does not. As Browne states, "In the absence of reasons for treating people unequally, they should be treated equally" (Browne, 1975, p. 46).

#### **Conflicting Meanings of Equality**

The English term equality has its origin in the Latin words *aequalis*, meaning 'equal', 'like', 'comparable', or 'similar', and *aequus*, meaning 'equal', 'fair', and 'just'. As Brian Barry asserts, "Equality, in its simplest form, is a comparative concept: it presupposes a relation between two or more entities that are alike in certain respects. To assert that men are equal is to claim that they share certain attributes in common, and that no relevant differences justify unequal treatment" (Barry, 1989, p. 25). For example, saying that A and B are equal means that A and B have certain things in common, at least in one respect. It is a comparative relationship between objects. However, we often misunderstand or misinterpret equality to identity. Equality is a kind of similarity rather than identity or sameness. In Mathematics, equality refers to the connection between expressions that share the same values. For instance, when it is said that A=B or A=B=C, it means that A, B, and C possess equal value; that is, they all have the same element or value. This is an example of identical equality.

Leibniz defined equality as identity. He asserts that two things are called equal if and only if they can be substituted for one another in every condition and situation (Macduffee, 1934, p. 10). Husserl remarks that this is a definition of identity, not equality. Contemporary philosophers disagree with Leibniz's view and use equality

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within conceptual frameworks—the substitution of expression. For them, "Two things are called equal if, upon substituting one for the other in any expression, the new expression is equal to the original expression" (Macduffee, 1934, p. 10). Whitehead and Russell in Principia Mathematica defined identity expression at an operative length as follows: (I) given any two elements x and y, either x = y or  $x \neq y$  (determinative relation); (II) x = x (Reflexive relation); (III) if x = y, then y = x (symmetric relation); and (IV) if x = y and y = z, then x = z (transitive relation). In contrast to Leibniz, these are the examples of identical expressions that are employed in mathematics today as 'equal expressions'.

In social sciences, the expression 'equality' is commonly used to refer to a comparison, balance, or likeness. When a statement is made in social science that *p* and q are equal, it does not imply that they are equivalent in every aspect; instead, it simply means that they are equal in one or more aspects. In this context, equality refers to the balance or equivalency in terms of rights, fairness, and social advantage, etc. In other words, in contrast to mathematics, where equality denotes an identical relationship, in social science, equality refers to a comparable relationship. This is the most evident and constrained expression of the term equality. A thorough examination of equality reveals that the relationships between things are not straightforward, as mentioned above, but rather, it is complicated. The central concerns are: To whom does this relationship refer? Is this relationship about worse off and worse off? Or, is it between well off and well off? Or, is it about the worse off and well off? For example, what about the two newborns, one of whom is born into a wealthy household and the other into a lowincome family? As human beings, they are both entitled to some fundamental unalienable rights. The child from the wealthy family succeeds by taking advantage of the resources available to them, but the young star from the low-income family does not. In the most general sense of equality, they are equal, but are they so actually? They are not. Therefore, it is evident that the relationship is about more than just people who have a similar quantity of something; we must elucidate.

#### The Typologies of Equality

The dimensions of equality are fundamental in understanding its core meanings. In the discourse of equality, there are two widely recognised forms of equality, namely (I) Formal equality and (II) Equality of opportunity. Formal equality encompasses two crucial dimensions: (a) Equality before the law and (b) Equal protection under law. Equality of opportunity is further categorised into two types: (a) Formal equality of opportunity and (b) Substantive equality of opportunity. There is another comprehensive form of equality, known as (III) Fair equality of opportunity. Let us briefly discuss and understand these aspects.

(I) Formal equality: Aristotle is credited with introducing the first traditional approach to formal equality. Defining formal equality, Aristotle, in his celebrated book, the *Nichomachean Ethics*, states that "Things that are alike should be treated alike, while things that are unalike should be treated unalike in proportion to their unalikeness" (Westen, 1982, p. 543). According to this definition, formal equality involves the idea that individuals, groups or objects that share a specific quantity or set of characteristics, at least in one respect or more, should be treated as equals. This is the most general idea

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of formal equality. In his exploration of the virtue of justice, Aristotle used the term 'equal' (isós) in a sense similar to fairness. Formal equality does not entertain any forms of natural differences. Additionally, it also does not accept gender differences, i.e., between men and women. According to John Stuart Mill, "it is not sufficient to maintain that women on the average are less gifted than men on the average, with certain of the higher mental faculties, or that a smaller number of women than of men are fit for occupations and functions of the highest intellectual character" (Mill, 1869, Chapter 3; Mukherjee and Ramaswamy, 1996, p. 64). The first two articles of the Universal Declaration of Human Rights (1948) are the best definitions of formal equality. These are as follows: First principle: "All human beings are born free and equal in dignity and rights. They are endowed with reason and conscience and should act towards one another in a spirit of brotherhood." Second Principle: "Everyone is entitled to all the rights and freedoms outlined in this Declaration without distinction of any kind, such as race, colour, sex, language, religion, political or other opinion, national and social origin, property, birth or other status. Furthermore, no distinction shall be made based on political, jurisdictional or international status of the country or territory to which a person belongs, whether it be independent, trust, non-self-governing or under any other limitation of sovereignty" (Universal Declaration of Human Rights, 1948).

Several ancient political philosophers define formal equality in terms of natural equality. Philosophers from the seventeenth and eighteenth centuries, including Locke, Hobbes and Rousseau, argued that all people are created equal. In his *Two Treatises of Government*, Locke argued that all people are born into a state of perfect liberty and equality. For him, each human being is descended from nature and is therefore made in the image of God. Thomas Hobbes, in *Leviathan*, also stated that all people in the state of nature are created equal. In the opening of his book, *The Social Contract*, Jean-Jacques Rousseau asserts that "Man is born free, and everywhere he is in chains" (Rousseau, 1968, p. 49). Just like Locke and Hobbes, he also upholds the natural equality of human beings and imagines their state of natural liberty. Since it is based on the formal sameness of all individuals, formal equality ignores the realities of lived experiences; that is, it fails to account for inherent differences and systematic disadvantages among individuals or groups. Formal equality has two significant forms: (a) Equality before the law and (b) Equal protection under the law.

(a) Equality before the law: Equality before the law is a kind of moral appeal against any discriminatory actions. Hence, it is also known as 'equality in the eyes of the law.' The salient feature of equality before the law is that it is colour blind. It involves the idea that no person is above the law of the land. Everyone is subject to the law and should be treated equally under the law. Consider the most famous and significant statement regarding formal equality: "The law, in its majestic equality, forbids the rich as well as the poor to sleep under bridges, to beg in the streets, and to steal bread" (Sepielli, 2013, p. 673). To put it another way, it states that every individual is subject to the ordinary law of the land, regardless of their social standing, that is, rank, position, and faith. This conception of equality before the law is said to have originated with the French Revolution. In addition to focusing on the just application of the law, the revolution was

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primarily directed against any privilege or favourable treatment based on noble birth, and to achieve formal equality.

(b) Equal Protection under the law: The idea of equal protection under the law was first introduced in the USA. It involves the concept of equal treatment under equal circumstances. That is to say that no one should be treated differently when placed in an equivalent situation. While equality before the law does not emphasise the advantages or disadvantages of individuals or groups based on language, sex, race, origin, income, wealth or nationality, etc., equal protection under the law considers these conditions and prohibits all forms of discrimination. The Aristotelian principle of treating like as alike is the foundation of this idea.

However, the formal aspect of equality has many drawbacks and is criticised by many. It is said that formal equality is a weak principle for treating individuals equally. For example, Daniel Lyons argues that "a philanthropist who treats two beggars dissimilarly is not automatically unjust" (Lyons, 1966, p. 146). The claim that humans are superior to dogs signifies another significant flaw of formal equality. The question is: Why are humans considered superior to dogs? The reason for this is that humans are considerably superior to dogs in many aspects, including behaviour and thought process. Now, the question arises that if superior thinking and performance are used as a criterion to distinguish humans as superior to dogs, then why can't an individual or group of individuals who think or perform better than others be regarded as superior to others? Further, one can wonder: Does a person's talent or merit possess any value at all? Or, is an individual's extraordinary ability or talent worthless in the context of formal equality? Indeed, a person's talent holds greater value; nobody can deny that. Whatever it may be, formal equality is not concerned about such things. It only addresses the formal sameness of individuals. For instance, when the third president of the United States, Thomas Jefferson, stated that all men are created equal, he did not imply that all men were formed equal in every respect or that he disregarded individual unique ability or talent. He just focused on the formal sameness of people.

There is no doubt that statements like *all men are born free and equal, and all men are equal before the law* are indisputably true. It is also true that most judges set aside their prejudices and apply the law impartially. However, the question is: whether a financially weak person, who is equal before the law and has the same legal protections, can correctly argue his case? Further, is it possible for the persons who are either socially, economically or historically backwards to be treated as equal with others, even if they are equal before the law and equally protected by the law? It is not conceivable, of course. Thus, it denotes another facet of equality, called *equality of opportunity*.

(II) Equality of Opportunity: Equality of opportunity is a much-contested concept. As Westen asserts, "Equal opportunity is neither a single state of affairs nor ideal—neither difficult to attain nor inherently desirable" (Westen, 1985, p. 837). He further states that "we profess to believe in equal opportunity, yet we allow unequal opportunity to abound" (Ibid., p. 837). However, the word 'opportunity' in equal opportunity refers to everyone's equal chance at achieving a desired outcome. The central claim of equality of opportunity is that: "To say two persons possess (or ought to possess) opportunities

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means that they possess (ought to possess) chances to attain given goals without hindrance of given obstacles" (Ibid., p. 844). To put it simply, equality of opportunity is consistent with the notion that everyone in society should be given an equal opportunity without being hampered by artificial barriers. For instance, two students should have an equal chance to compete for admission to a reputable university following the principle of equality of opportunity. Two forms of equality of opportunity are widely accepted. The first is the nondiscrimination principle, known as formal equality of opportunity, and the second is substantive equality of opportunity, which is connected with the development of living conditions of the people.

(a) Formal equality of opportunity: The formal equality of opportunity is thought to be an extension of formal or legal equality. In its most basic sense, formal equality of opportunity means a fair go for everyone. This principle maintains that there should be no direct discrimination; that is, "in the competition for position in society, individuals should be judged only on attributes relevant to the performance of the duties of the position in question. Attributes such as race or sex should not be taken into account" (Roemer, 2009, p. 1). It implies that the job should be given to the most qualified candidate who truly deserves it, rather than someone who does not for any unrelated reason, such as age, caste, social status, disability or religion. For instance, formal equality of opportunity seeks to prohibit any discrimination based on a person's circumstances when applying for a job. In short, the positions should be open to all.

Formal equality of opportunity is a theoretical concept and has limitations. Assuming that all the superior or highest positions are filled through fair application, what about those who wish to be equally qualified for the same position but are unfortunately less talented? What about those who are historically and socially disadvantaged and unable to return to the mainstream of social and political life? Formal equality of opportunity is not concerned with these issues. It solely focused on eliminating discriminatory practices in daily lives. Hence, thinkers proposed another robust aspect of equality, commonly termed as *substantive equality of opportunity*.

(b) Substantive equality of opportunity: Substantive equality of opportunity consists of the idea that every individual should have an equal chance to realise their potentialities and achieve desired goals. It holds that "society should do what it can to level the playing field among persons who compete for positions, especially during their formative years, so that all those who have the relevant potential attributes can be considered" (Roemer, 2009, p. 10). In short, it seeks to create equal opportunity conditions for everyone, taking into account each individual's potential and needs. There are considerable disagreements on the nature and types of opportunities, as there are variations in the demands based on the individual. Some believe that opportunities should primarily be financial, while others argue that opportunities should include intangible benefits such as individual development or social recognition.

(III) Fair Equality of Opportunity: John Rawls is credited with offering this dimension of equality. According to this principle, "social and economic inequalities are to be arranged so that they are both (a) reasonably expected to be to everyone's advantage, and (b) attached to positions and offices open to all" (Rawls, 1999, p. 53). Golden

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Marshall also holds a similar view that "positions are to be open to all under conditions in which persons of similar abilities have equal access to office" (Scott and Marshal, 2009, p. 379). However, the term *careers open to talent* should not be confused with Rawls's *fair equality of opportunity* principle. According to Rawls, career open to talent is a weaker principle. A weaker principle of equality of opportunity requires that all positions must be open to all in a fair competition, with the most competent applicant being allowed to hold official positions. Rawls explains fair equality of opportunity as follows: "Those with similar abilities and skills should have similar life chances. More specifically, assuming that there is a distribution of natural assets, those who are at the same level of talent and ability, and have the same willingness to use them, should have the same prospects of success regardless of their initial place in the social system" (Rawls, 1999, p. 63).

#### Conclusion

The philosophical analysis of the concept of equality reveals a nuanced, multilayered, and dynamic idea of equality. What emerges evidently from this discussion is that it seems impossible to provide a single and universally applicable definition of equality. Furthermore, equality should not be understood only in a numerical or identical sense, but also from an intellectual, contextual and relational sense. It is argued that equality denotes absolute equality. For example, egalitarianism asserts that human beings are fundamentally equal. For them, in society, no individual is inherently superior, nor are they entitled to privileges over others by birth, race, or social status. However, the fact is that each individual is different from one another in many aspects. Despite the natural differences, everyone possesses different life prospects and goals. Indeed, the idea of equality does not refer to absolute equality, but instead it is essentially linked to the concept of fairness, equal dignity, respect and opportunity. It emphasises the elimination of all forms of social and natural inequalities, and to extent, providing equal opportunity to all. We may contend that absolute equality is not only undesirable but also impossible to achieve. If the social hierarchical status did not exist, it would create structural chaos in society. Above all, the exploration of the metaphysical ambiguities of the concept of equality is not abstract; it is rooted in the pursuit of individual recognition, participation, and freedom. However, we will conclude by outlining a few fundamental, attainable, and uncontroversial aspects of equality.

- (i) Equality does not mean absolute equality; rather, fundamental equality. The assertions like *all men are equal and born free*, or *all people should be treated as equal*, do not imply that all men are similar or equal in each respect; instead, they assert that all human beings by their existence deserve equal moral worth, dignity, and respect. For example, identifying oneself as a feminist does not imply that one despises men and treats them as bad; instead, it refers to the belief that men and women should be treated equally in terms of dignity, moral worth, and freedom.
- (ii) Equality refers to relational and comparative equality. As a relational concept, it focuses on the relationships between individuals, groups, or entities—how they are socially situated—and seeks to eliminate the differences among them to establish a just

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and equitable society. On the other hand, as a comparative ideal, equality is concerned with equitable distribution of social goods, opportunities and outcomes. It aims to provide equal opportunities for everyone to realise their potential. Although the primary objective of equality is to abolish discriminatory practices in society, it is also concerned with the fundamental equal rights and opportunities of individuals.

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