

# Equality, Inequality and Difference

*New Cultural Frontiers*

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## **Introduction**

The idea of equality as a paramount value is one of the major characteristics of modernity (Dumont, 1977). As observed in the literature, together with the emergence and consolidation of the nation-state as an ideological amalgamation of authority and solidarity, equality came to constitute the core notion underlying the institutionalization of the modern status of citizenship (Bendix, 1964; Reis, 1998). Rejecting the idea of natural differences that in pre-modern times justified rigid social hierarchies, the individualistic culture redefined the opposite of equal as “unequal”, and no longer as “different”. It is only in the second half of the twentieth century that people gradually brought to the front stage the idea of the right to difference as a legitimate claim. Furthermore, instead of perceived as a threat to equality, difference recognition is now posed as a necessary condition to enforce equality.

In what follows, first I briefly comment on the historical emergence of the modern equality ideology. I observe that differences were pushed to the backstage while still justifying the exclusion of particular groups. Then, I observe that only much later difference came to be perceived as compatible rather than opposed to equality, a change that poses new challenges not just for social theory, but for social policy as well. Suggesting that the various approaches available to sociologists reveal distinctive angles of the puzzle that difference and equality offers to theoreticians and policy makers, I then conclude with a defence of theoretical and methodological pluralism. My argument is that sociology fulfils the relevance criteria by illuminating

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from different perspectives crucial issues involving social distribution of material and symbolic resources and their impact on the interface of equality and difference. While in the past the mainstream approach to inequality revolved around the measurement of income and/or some objective indicators of socio economic status, today the need to account also for the subjective aspects of the distributive issue is widely recognized. At the same time, quantitative and qualitative resources of analysis are now perceived as complementary rather than at odds.

### **1. The cultural revolution of equality**

The idea that people share a common element that is their very humanity is already present in traditional worldviews such as old Christianity and, some say, even earlier (Clarke, 1994.). However, a connection between that belief and the idea that our universal individuality is the basis of a substantive equality that abhors natural hierarchies only emerges in the modern age. This way of conceiving of human society replaced the old polarity between equal and different by the one between equal and unequal. While differences did not vanish in the modern world, they became the category to accommodate the unequal, those excluded from full membership in the political community.

The strengthening of the idea of equality is closely related to the affirmation of individualism as well as to the making of nation-states. Instead of membership in distinctive status groups, individuals became co-members of a national community, sharing at the same time in the recognition of a single authority. The ideologically constructed equality of co-nationals vis-à-vis the state blurred long established restrictive identities (Anderson, 1983). As co-citizens people could not be thought of as different among themselves. In the context of the European modernization process, this was a long and turbulent process whose causes and consequences were not anticipated (Elias, 1982; Tilly, 1975). But, once consolidated, the nation state came to be perceived as a natural development of societal organization, therefore becoming a model emulated all over.

As members of a common political community, citizens ceased to be conceived as members of substantively different groups, to be recognized as individuals who are

entitled to equal rights granted by an authority to which they own duties and pay loyalty. Such equality certainly did not entail economic equality. To the contrary, the idea was that of formally equal individuals, people who faced the same opportunities would occupy distinctive positions in the market depending on their individual performance.

It is clear though that difference never really ceased to be socially relevant. In the modern world of equality, difference continued to be the basis for the exclusion of particular groups from the distribution of values and goods. Categorical distinctions such as gender, ethnicity, and colour continued to be used as ideological justification in order to deny the status of full individuals to some groups. Differences have remained the ground for persisting inequalities (Tilly, 1999). In other words, in cultural-ideological terms difference became a way to conceive of otherwise unacceptable inequalities within the polity. The different were those to who did not belong, who did not qualify for citizenship. Various constructs were elaborated seeking to justify why some people did not deserve to be taken as equals, as full individuals. Historically, the conventional moral justification for the re-introduction of slavery in modern times is a clear if extreme case one can think of.

Yet, the cultural transformation that then took place removed differences to the backstage. The battle against the Old Order in Europe was won when attributed statuses were abolished to give space to the equal rights principle which presupposed the universality of the individual. In fact, originally the world of the equal citizens was quite restricted: incomes, literacy, gender, were some of the criteria used to distinguish between the equal citizens and the others, the excluded. But looking at history we observe how the equality ideology gradually expanded to encompass more and more social segments. Yet, the inclusionary movement was not fast, not painless, and not complete. Thus for example, workers had to struggle hard for generations before securing the right of combination that would pave their way to the political community (Bendix, 1964). Women took even longer to acquire citizenship status and still in many contexts their full individuality is not recognized. Moreover, when one looks at our contemporary world, it is just obvious that new frontiers between *us*

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and *them* keep using the idea of difference to justify the exclusion of particular groups or segments.

Although incomplete and prone to contradictions, the impact of the equality ideology, inspired national independence movements, demands for citizenship and redistributive policies in different quarters of the world. While entangled with distinctive cultural traditions, the new ideology relegated differences to a much less prominent position. In fact, differences remained relevant, but they came to be socially understood as either just or unjust justifications for inequality. In other words, the equality ideology ended up conferring negativity to difference.

From a historical perspective, we can better understand why it is often difficult to reconcile the notions of equality and difference. Taking into account that the affirmation of the value of equality had to demolish the centuries old belief in the naturalness of social differences, we realize how the idea of difference was understated in modern times to provide room for the then new binary opposition equal versus unequal. Looking at more recent history we observe for example that in the de-colonization process, the project of nation building sought to conceal ethnic, religious, or language differences in order create a political community, some times with tragic consequences. At first contemporary identity conflicts in such contexts were perceived as mere attempts to revive pre-modern features. It took some time before it became clear that demands for difference recognition were a contemporary feature rather than a sheer attempt to reverse history.

### **2. The historical turn to difference**

After mid-twentieth century we observe a gradual rise of difference as a positive value. Historically, the black is beautiful slogan that inspired the mobilization for civil rights in the US signals to the cultural turn that decades later was to bring recognition of difference to the forefront of a vast array of demands articulated by social movements around the globe. In time, as identity claims became more and more widespread and not restricted to ex-colonies, it also became clear that recognition of differences could not simply be equated to traditionalism. Instead, changes in course pointed to a turning point in the modern project. A deep cultural

transformation can be seen as cause and consequence of new ways to conceive of the world. A world in which individuality, subjectivity, and chosen identities, acquire renewed importance (Touraine, 2000; Giddens, 1991; Castells, 1997).

Indeed, the resurgence of difference as a salient positive feature of society is one of the deep cultural transformations that we observe in the contemporary world. The importance that identity issues have acquired today leaves no margin to doubt: the modern notion of individualism that made room for the value of equality, now shares the space with demands for the recognition of collective differences chosen by individuals as legitimate loci of loyalty. Instead of the attributed differences that in pre-modern times justified the hierarchical ordination of society, now it is still based on the equality of individuals that people express their subjectivity and claim the right to freely choose identities that differentiate them from others.

Taking into account the historical development of the equality ideal and its concealment of differences, it becomes clearer why the need for recognition emerged in last decades as crucial among groups that were or still are deprived of access to full membership in their social contexts. In a way, recognition became the sine-qua-non target in claims for equality that mobilize gender, colour, ethnicity, religion, language or any other possible specificity that implicitly or explicitly have been used to deprive groups of people of the equality that traditionally grounded notions of membership in national communities. Furthermore, more and more we observe demands for the recognition of particular identities posed by groups that do not see their particularity as in conflict with national identity. Many now claim for the recognition of their group distinctiveness and see it as a condition to affirm their individuality. The notion that identities are chosen and contingent gains more and more acceptance as not the negation but rather the full affirmation of individuality.

Some observers fear this identitarian drive that could in their view tilt the social balance towards expressive concerns, giving up the fight for equality (Barry, 2001; Benhabib, 2002; Waldron, 1995). Some go as far as to identify the renewed quest for identity and the defence of plural loyalties with a deliberate strategy to promote segmented communities, thus diverting distributive efforts. Others, in turn, bet

precisely on multiculturalism, seeing in the recognition of differences a strategy to overcome inequality. From their perspective, the active promotion of diversity, the recognition of differences, and the multiplicity of identities are the stuff that enhance the equality ideal in the global era (Gutmann, 2003; Taylor, 1992; Young, 1990). The debates between different sides of the dispute go on among theorists, as well as among those who explore the issue in policy terms (Fraser and Honneth, 2003; Kelly, 2002).

No matter if we analysts perceive this move as progressive or conservative: we cannot simply ignore that this way of looking at the world has gained currency, nor can we left unexamined all the possible implications of the identity issue in the contemporary world.

As in so many other areas of dispute among social scientists, this one has direct policy implications, but the consequences of one or another interpretation are not pre-determined. Thus, for example, there is not a mechanic connection between identity choice, claims for recognition and retreat to the expressive world in detriment of instrumental objectives. But it is not granted either that the recognition of a group difference will automatically assure its member immediate material gains. Policy and politics will go on intermingled and their outcomes will still depend on the moves of all the players in the power game. Moreover, while part of a global process, the changes as experienced by real actors are not immune to their past experiences and by the history of the context they belong to. Thus, for example, the way people perceive the relationship between equality and difference is significantly affected by the specific traditions of differences and inequalities they live with.

In any case, the implications of the cultural transformation that brought new meaning to difference pose huge challenges to social sciences today. No matter if we perceive the present as *post*, *neo*, or *ultra modern*, there is no doubt that the space difference occupies on it has changed significantly. It is important to stress the historical cultural novelty at play here: the transformation of the present affirms the co-existence of equality and difference and both came to be perceived as opposed to inequality. The move towards reflexivity, subjectivity and identity concerns brought

new lights to the interrelations between difference, equality, and inequality. Both in theoretical and empirical terms, we confront new questions while discussing identity and recognition, distributive justice, stratification, social policy, and many other issues. Competing approaches and research techniques have contributed to illuminate different angles of contemporary inequalities. It would be unrealistic to search for a synthetic view that could amalgamate different sociological perspectives. But simply exploring what each one of them reveals might contribute to expand shared knowledge, to stimulate further theoretical dialogues, and throw lights into the implications of particular social policies.

### **3. Equality, difference and inequality through the looking glass of analytical options**

As the debates we observe among philosophers and among social theorists make clear, there is no straight answer to the contemporary puzzle of reconciling equality and difference. To grasp the complex relationships between them, both in theoretical and empirical terms, we must take into account new ways of conceiving the world. That many people seem to consider differences as the common ground for equality constitutes a clear ideological change. This deep cultural transformation that is taking place is in itself an intriguing subject of investigation that contributes to shed new lights on distributive issues. In other words, cultural analysis plays an important role in mapping out new ways of looking at the world.

While it is crucial to make sense of the apparently contradictory claim for recognition of difference as a demand for equality, it is important to look at history for insightful parallels. Can we think, for example, of the historical demand for combination posed by workers striving to unionize in industrializing Europe as isomorphic to the demand for gender or ethnic rights that we observe today? Certainly there are differences to the extent that demands for unionization challenged the individual ideology but did not question its non adscription postulate. But, *mutatis mutandi* one could say that claiming distinctiveness minorities are demanding to convert it into a combination resource that will make possible to have their equality/individuality qua human beings recognized. Revisiting the classic literature

on nation building and the spread of citizenship rights the historical sociologists produced might also contribute to generate insights into the dilemmas of the present. (Bendix, 1964; Grillo, 1980; Turner, 1993).

If historical parallels might contribute to illuminate the present, it is also crucial to keep track of the distinctiveness of contemporary challenges looking at historical contrasts as well. Thus, for example, if the equality ideology contributed to the making of nation-states, the valuation of difference occurs under the force of global fluxes that challenge the conventional understandings of social belonging, and show the limits of old citizenship models (Kymlicka, 1995; Held, 1995; Beck, 2006). In short, be it stressing parallels or contrasts historical sociology can contribute to the understanding of our present.

Among the various analytical angles available for discussing difference, equality and inequality, the focus on the symbolic dimension of society constitutes another resourceful option to grasp the dilemmas of the present. How people devise symbolic frontiers between us and them, which images they use to picture their distinctiveness vis-à-vis others, how they frame moral arguments to demand recognition, constitute extremely valuable information to map out the present quest for social justice (Lamont and Molnar, 2002).

At the same time, the standard approaches to explain and measure inequalities remain paramount if we want to expand our knowledge about distributive issues. It is not only that these approaches provide critical information to map out inequalities and to evaluate the efficacy of particular policies. Apart from their positive and instrumental roles, they fulfil also symbolic-cultural roles, contributing to create images of inequality, thus providing resources for discussing distributive justice.

Needless to say, the social philosophy and social theory debates on equality, difference, recognition, and social justice will remain the solid ground upon which the diverse theories and methods will evolve. What I am suggesting here is not an eclectic theoretical collage. Quite to the contrary, I want to stress the importance of specialization, of theoretical consistency, of logical presuppositional choices. The more complex the social picture gets, the greater the need for rigorous choice of

analytical angles. That different angles contribute to illuminate an issue does not mean that they merge together. The conversation across theoretical boundaries contributes to greater clarity, but do not automatically produce synthesis. The latter, when it happens, is still one more specialization.

Taking into account this urgent need to investigate the complex interaction between equality, difference and inequality, the research program we carry on in the Interdisciplinary Research Network for the Study of Inequalities (NIED) at the Federal University of Rio de Janeiro aims at an open conversation between plural views. At present our program focuses on public and private strategies to cope with inequality, discrimination and social exclusion. We use both qualitative and quantitative approaches, and in some cases we compare data for Brazil and for other national contexts with the general purpose of accounting for material and symbolic dimensions of analysis that contribute to the understanding of the entanglements that characterize difference and inequality . Thus, part of the research team focus on perceptions, attitudes and behaviours (Reis and Moore, 1995; Silva and Reis, forthcoming). Taking into account that both inequality and difference are relational notions, this side of the team looks at different social segments inquiring how they construct images for themselves and for the others. In this context, both ideal and material elements actor mobilize to talk about difference, equality and inequality. Simultaneously, another team concentrates on the study of the nexus between education, labour market, income, and related dimensions that are translated into inequalities and differences (Henriques, 2000). Looking at the temporal dynamics of such dimensions, they also proceed to examine the implementation and impact of specific distributive policies (Paes de Barros et. all. 2006). These different research projects ask different questions and make different assumptions about the social world. Yet, together, they complement each other, and can illuminate different mechanisms through which inequality is reproduced and challenged in Brazil.

#### **4. Final observations**

To conclude with, let us not forget that equality remains the crucial value in justifying social justice. The equality ideology that put into question the traditional

vision of the world as naturally stratified is the moral ground upon which equality and difference are both pictured as opposed to inequality. The very awareness of the lasting impact of the ideological symbiosis between equality and individualism should sensitize us to the potentialities of the cultural transformation that brought difference into a new focus in social perceptions.

In what respects our own province, sociological theory, the suppression of difference – considered to be antithetic to equality - had serious consequences. Thus, for example, only in recent decades we came to admit that there are different models of modernity, that modernization is not necessarily the single path that generations of sociologists sustained. The cultural changes we experience today suggest us that instead of repressing equality, differences can be a necessary (while not sufficient) condition for it. Incorporating the value of diversity, we enable ourselves to fight for a more egalitarian, more tolerant, and more enriched world. However, let me emphasize that recognition of differences is a necessary, not a sufficient condition. It is not in the comfort of relativism that we pursue equality. Social justice, human rights, fraternity remain our universal values, the ethical ground that justifies sociology or any other science for that matter. For us sociologists, the move from a one-sided conception of inequality as opposed just to equality, to one that conceives of equality and difference not only as compatible, but also instrumental to each other remains a major task.

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