

Mälardalen University

Västerås, 2012-01-19
School of Sustainable Development of
Society and Technology
Bachelor Thesis in Political Science
Supervisor: Astrid Fell
Examinator: Mikael Axberg



MÄLARDALEN UNIVERSITY
SWEDEN

Mälardalen University

The importance of equality

Author: Jori Lahdenperä

Bachelor thesis in political science

Title: The importance of equality:

Author: Jori Lahdenperä

Supervisor: Astrid Fell

Opponent: Peter Sundström

Date: 2012-01-19

Key words: Equality, Equal Value, Social Wellbeing, Individual Wellbeing, Inequality, Social Well-being, Individual well-being

Abstract

This thesis is mainly concerned with how equality is related to social and individual wellbeing. It is widely believed that inequalities are both necessary and beneficial for society. This has been repudiated by recent studies claiming the opposite. This thesis will first elaborate on the concept of equality before investigating the relation between inequalities and different components of wellbeing with the use of a literature review. It finds that several adverse effects are correlated with inequalities and that competition might be an explanation for- as well as an amplifier of the adverse effects. Based on these findings, the thesis presents some guidelines for incorporating equality within a set of policy-areas. It concludes that the main points of importance are to avoid connecting the ability and merit of a person to the value of that person as well as to achieve material equality: both these working as a foundation for a subjective feeling of equality in value.

Acknowledgements

I would first of all like to express my gratitude towards Astrid Fell, my supervisor, for the guidance and support that she has given. Secondly I'd like to thank those friends and fellow students who have helped me to develop ideas and given me advice and inspiration during my work.

Table of Contents

1. Introduction.....	1
2. Method.....	3
2.1. Problem.....	3
2.2. Aim.....	4
2.3. Questions.....	4
2.4. Method and disposition.....	4
2.5. Data collection.....	5
2.6. Limitations.....	6
3. Equality.....	7
3.1. Etymology of equality.....	7
3.2. Theories of equality.....	8
3.3. The case against equality.....	9
3.1. For this thesis.....	10
3.2. Conclusion.....	11
4. The importance of equality.....	12
4.1. Confidence and anxiety.....	14
4.2. Relations and trust.....	17
4.3. Culture.....	20
4.4. Stress and obesity:.....	21
4.5. Education.....	22
4.6. Violence and crimes:.....	25
4.7. Social mobility.....	26
4.8. Poverty.....	27
4.9. Analyzes.....	28
4.10. Conclusion:.....	31
5. Guidelines for Equality.....	32

5.1. Two conceptions of equality.....	32
5.2. Policy-areas	34
5.3. Economic equality	35
5.4. Juridical equality.....	37
5.5. Educational institution.....	38
5.6. Conclusion	38
6. Discussion	40
7. List of references.....	42

1. Introduction

There are many ways to consider and incorporate equality. The meaning of equality is different for different people. It is frequently used when discussing justice which gives rise to a lot of ambiguities concerning its nature. Who are equal? In what aspects are they equal? How are they to be treated equally? These are just a few questions that theoreticians have to tamper with.

It becomes quite evident that choosing the way to incorporating equality is not at all straightforward. Different institutions have tried to achieve this in different ways. The Swedish National Agency for Education has published a document, labelled 'Dissimilar with similar value'¹ which works as a guideline for teachers and other employees within the educational system. The purpose is to assure that all pupils will have an enjoyable time at school free from discrimination, abuse and bullying regardless of race, gender, social status, sexuality or possible disabilities. The principle of democracy and the pronounced objective for democratic societies is to assure that everyone has an equal voice in deciding the direction of policies and in deciding which party that is to have control over the government. Everyone is granted one equal voice regardless of intelligence, knowledge, education or moral dignity². The judicial system is intended to be blind to the characteristics of a person. That everyone is equal in the eyes of the law is a statement that most of us are familiar with. It refers to an ambition of treating each and every person in the same way regardless of wealth, race, gender, stature or any other arbitrarily chosen quality. In the UN's declaration of human rights every human is to be seen as possessing the same dignity and rights. It lists numerous ways in which humans are not to be treated as well as numerous rights that everyone holds; including the right to free movement and entitlement to just and unbiased trials when accused. All this is

¹Authors translation. (Olikas lika värde)

Olikas lika värde: om arbetet mot mobbning och kränkande behandling. 2003., Stockholm: Myndigheten för skolutveckling.

² This is generally valid; still there exists exemptions where imprisoned persons are deprived from their right to vote.

valid for every human “without distinctions of any kind”³. The economic system of most countries strives to grant everybody with equality in opportunity. This recognizes that positions exist with different authority and power, and occupations that are better rewarded than others, but these positions have to be available to all members of society and their holders must be determined by some form of competition.

These are just a few examples of how society and its different sections strive to incorporate equality. Still there exist widespread inequalities with regard to income, wealth and influence. Even in USA, which is one of the country with the highest GDP⁴ (Gross Domestic Product) per capita⁵, inequalities in distribution still leads to some people being considered as poor as they live on an income that puts them under the national poverty line. In other countries the situation is much more severe and unequal distribution, rather than scarcity, leads to starvation and malnutrition. The divergence between the poor and the rich keeps growing both within countries and between countries. There is no limitation to the amount of wealth that a person can hold and the inequalities with relevance to possession have now reached a level at which the top 1% wealthiest people of the world own more than the ‘bottom’ 95% does⁶.

Inequalities are not only problematic in the sense that they lead to absolute deprivation; the relative differences in income and wealth also lead to stratified societies in which status can be a stressful concern giving rise to feelings of anxiety and low self-esteem.

This thesis will first investigate how inequalities affect our wellbeing and thereafter take the findings to generate guidelines intended to lead towards a more equal society.

³ *Universal Declaration of Human Rights*, , United Nations Office of the High Commissioner for Human rights, 1948.

⁴ GDP is an aggregate of goods and services produced within an area. GDP per capita divides this value by the population and tends to work as an indicator of material standard of living.

⁵ World Bank Data Base, retrieved 2 December 2011 <<http://data.worldbank.org/>>

⁶ Inequality.org, *World / Global Inequality*, 2011, retrieved 12 December 2011, <<http://inequality.org/global-inequality/>>

2. Method

This chapter will first describe the problem that this thesis is concerned with, and explain why it is of importance. It will specify a clear purpose and list those questions that need to be answered in order to accomplish the purpose. Thereafter it will explain how these questions are to be answered as well as elaborate on necessary limitations.

2.1. Problem

There is a belief that the existence of inequalities is beneficial for society. One argument is that a stratified society allows for the possibility of advantageous differentiation which works as an incentive for people to work harder and thereby increase individual, as well as the whole society's, provision of goods and services. The consumption of these goods and services is thought to provide the consumer with utility and thereby increase his or her wellbeing, giving rise to the belief that the more production that a society achieves, the happier will it be.

This belief is contradicted by recent studies⁷ showing that inequalities bring with them a lot of social and health related problems. The struggle to prevail in the competition for status brings with it stress and anxiety. Humiliation combined with a sense of inferiority is usually the root cause for violence and the lack of inter-class relations deteriorates trust and social capital.

There is also a belief that those at the higher levels of the income hierarchy are benefited from the existence of inequalities. Even though this might be true for some factors, this thesis will still attempt to prove that the disadvantages outweigh the advantages, even for those at the higher strata of society.

⁷ This will be shown throughout the fourth chapter which handles adversaries connected to inequality.

2.2. Aim

This thesis has two main aims. The first one is to explore the importance of equality in increasing the wellbeing for society by understanding how it is connected to different aspects of social and individual wellbeing. The second one is to, with use of the findings from the first aim, consider guidelines for incorporating equality through different policy-areas. An elaboration on the concept of equality is, first of all, required to endeavour these aim.

2.3. Questions

These questions need to be answered in order to accomplish the aims:

- How has the concept of equality been used and regarded?
- Why is equality important?
- How can equality be pursued in society?

2.4. Method and disposition

The first question was answered by exploring what theories and definitions there is concerning equality, and how the term is used by different theoreticians. Their definitions are shortly presented to give an understanding of possible usages and meanings of the word. This chapter will also present arguments for inequality.

A literature review has been conducted in order to answer the second question concerning why equality is important. Publications: both books and articles concerning the topic were taken use of and a compilation of their findings was made. Wellbeing was divided into the different components that are most frequently encountered within the literature and their relation to inequality and stratification of society was explained. The findings were thereafter analyzed to attain a clearer understanding.

An attempt at answering the third question was made by first taking use of the findings from previous chapters to understand which aspects of equality that are most important top focus on. Two types of equality, as relevant for incorporating equality, have been explained and their strengths and weaknesses have been mentioned in order to understand contradicting perspectives on equality. The appropriate policy-areas for incorporating equality were considered. The analysis and conclusion from the previous chapter was taken use of in order reach some guidelines for the different policy areas.

It should be noted that the third chapter which defines equality, focuses on those aspects and divergences that are relevant for its definition and for its role in history. The fifth chapter which concerns the incorporation of equality presents a different distinction between conceptions of equality. This distinction is located in the fifth chapter rather than the third as it is more of relevance for incorporation of equality and also used for this purpose within the present thesis.

2.5. Data collection

The data in this thesis consists of scientific articles and books handling the topic of equality. Those graphs and statistics that are presented, are of a secondary nature as they are found within the literature and produced by other scientists. The publications used were partly found by searching Mälardalen University's library and online databases such as JSTOR and LibHub. The reference lists of those publications read have been another advantageous source for finding relevant articles and books.

There is one book that has been of extra importance in understanding the adverse effects of inequality. Since it is being frequently referred to in this thesis, the book deserves to be described here. The book's title is 'The Spirit Level'. The Swedish translation which is used and referred to is called 'Jämlikhetsanden'. The authors Richard Wilkinson, a professor from University of Nottingham Medical School, and Kate Pickett, a senior lecturer at University of York, both have extensive experience with social health research. They have gone through a vast amount of data and studies concerning inequality and wellbeing and used their

experience and knowledge to shed light on the findings. The book 'The Spirit Level' is the result of their efforts.

2.6. Limitations

Most part of the empirical references that are presented within this thesis are limited to only concern the developed countries. In less developed countries the adverse effects of inequalities can be related to that people are denied the basic necessities and therefore not reflect the adverse effects of inequality in itself but instead the poverty springing from it.

The last question, considering how society can become more equal, will be answered through giving guidelines with relevance to certain policy areas. It could be thought that policy recommendations would be more adequate for this purpose. Unfortunately that approach would exceed the extent of this thesis as a discussion concerning the implications, implementations and justness of those policies would be necessary.

3. Equality

It is not always clear what precisely is meant with a certain concept. Many disputes can arise, not as results of disparaging opinions, but rather due to varying comprehension of what it is exactly that is being discussed and claimed. The same notion will most certainly have different meaning or different nuances for persons with different experience and backgrounds. It is crucial to understand exactly what it is that is being said to avoid misunderstandings.

Another reason for defining a concept is to enable an operationalization. It is beneficial to be able to measure the level of inequalities in different countries and areas, and it is for this purpose important to know exactly what it is that is being measured. A concept needs to be defined if adequate indicators are to be determined. Even though no such undertakings are being conducted within this thesis, still it is important to understand this since reference is given to studies where it has been done.

This chapter will elaborate on the meaning of equality and present theories concerning it in order to give a better understanding of the concept and its usage.

3.1. Etymology of equality

Equality, from French *égalité*, refers both to similarity and to dissimilarity. If two objects are to be regarded as equal, then they need to be similar in at least one aspect, while at the same time dissimilar in other aspects, in order not to be identical. When discussing equality and inequality it is important to clarify which aspect that is being referred to.

An important distinction to make is whether the notion of equality is used in a descriptive or prescriptive purpose. In a descriptive sense, it just describes equality between two or more objects and can be separated from justice. In the prescriptive sense, it is connected to an apprehension of what should be, and therefore, it is of a normative character. Since it is normative, it needs to be grounded in a certain pursued value. In a majority of cases,

concerning equality, this value is justice since any conception of justice must include a conception of equality.

3.2. Theories of equality

It should be mentioned, as hinted above, that equality is closely related to justice. It can be seen both as a part of more comprehensive theories of justice as well as being the crucial factor which's comprehension will determine ones conception of justice⁸. This is mentioned as the progression of the concept of equality cannot be separated from the progression of theories of justice throughout history.

Aristotle claimed there to be two kinds of equality; numerical and proportional⁹. This differentiation can best be exemplified by two kids sharing an apple: a boy at the age of ten and a girl at the age of seven. In the case of numerical equality there is no differentiation done between them. They will both have an equal share of the apple. In the case of proportional equality, on the other hand, it could be considered that the boy, being larger and in need of more nutrition, should be entitled to a bigger share of the apple. Hence numerical equality does not distinguish between persons while proportional equality refers to a specific aspect of the persons which is determined by the particularities of the case. Aristotle further claims that unequal distribution is just when people are unequal in the relevant aspect. The divergence in regard to the relevant aspect should be proportional to the divergence in their claims in order for persons to be treated equally¹⁰. He believed that all controversies concerning how justice is to be perceived can be traced to question of which cases are equal and which are unequal.

A more recent conception of equality was adopted as the ideas of natural law and a social contract was developed¹¹. Both these ideas build on a belief of equality in dignity, an idea with origins that can be traced back to early Christianity, Islam and Judaism: in which all

⁸ See Aristotle further down

⁹ Aristotle, *Nicomachean Ethics*, p. 1130b-1132.

¹⁰ Aristotle, *Politics*, p. 1282

¹¹ Ideas developed by Hobbes, Locke and Rousseau

people are equal in the eyes of God¹². Kant¹³ proclaimed the same freedom for all rational beings as a result of their autonomy and self-determination. The same way of thought can be found – as mentioned in the introduction – in UN’s declaration of human rights where the first article stipulates all persons as being equal in dignity and rights. Even though there seems to be agreement among these theoreticians concerning equality in dignity, still they have different opinions regarding its practical implications.

Rawls puts focus on the difference between social inequalities and natural inequalities in his ‘A Theory of Justice’. Natural inequalities refer to differences in talents and intelligence while social inequalities refer to distribution of material belongings: both of which he considers as belonging to society at large and not to the individuals possessing them. He thought that material resources, welfare and opportunities should be equalized and that inequalities were only to be allowed when they would be of benefit for those least benefited in society.

3.3. The case against equality

Equality with relevance to income and wealth has been refuted on several grounds. Those advocating inequality tend to claim it to be just whereas redistributions or systems of distribution that equalizes income and possessions are unjust. Others promote it as being beneficial for achieving wellbeing or material wealth.

Nozick is one of the most well-known among contemporary proponents for inequality. His theory of justice claims that any system for redistribution is a violation of the rights of the individual. The only just distribution of possession is the one that is a result of voluntary agreements between free individuals¹⁴.

¹² Stanford Encyclopedia of Philosophy, *Equality*, 2007, retrieved 8 December 2012, <<http://plato.stanford.edu/entries/equality/>>

¹³ E Kant, *Metaphysics of Morals*, 1797 p. 230

¹⁴ R Nozick, *Anarki, stat och utopi*. 1974

Many economists¹⁵ claim the necessity of inequalities in order to achieve a higher level of material wealth and as a necessary part of a system that will best promote wellbeing. They tend to consider it as a part or an indispensable consequence of the free-market system. Possibilities for advantageous differentiation (inequalities) work as motivation for people to perform better and to exert more efforts, increasing the productivity and also the amount of choices that are available to the consumers. People, pursuing profit, will take advantage of those opportunities that exist. Opportunities in turn arise from consumers' willingness to pay for a certain good or service. From this we can draw that the possibility of generating higher income and achieving an advantageous differentiation makes producers satisfy the needs of the consumers. It should be emphasized that the economists referred to do not necessarily promote inequality per se but rather sees it as a necessity and that they, to a varying degree, support redistributive actions.

3.1. For this thesis

The part of this thesis, connecting inequality to different components of social and individual wellbeing, will use a descriptive concept of equality. When talking about the extent of inequalities it will mostly refer to inequalities in income as these inequalities are easiest to measure and since they are seen as being fundamental for other types of inequality such as influence and opportunities on an aggregate level¹⁶.

The prescriptive part of this thesis tries to separate equality from justice and instead ground the value-based part in wellbeing. Those guidelines that are being recommended later on are not done so because they are considered as leading to a more just society, instead they are recommended as they are believed to increase the wellbeing of society¹⁷. This is partly because theories of justice can go both ways in most matters. Alliance to a certain way of

¹⁵ The most prominent among them are Adam Smith, Thomas Robert Malthus, David Ricardo, John Stuart Mills and Milton Friedman

¹⁶ R Wilkinson & K Pickett, *Jämlikhetsanden: Därför är mer jämlika samhällen nästan alltid bättre samhällen*, Karneval Förlag, 2009, p. 27

¹⁷ Of course this way of thought could be regarded as adhering to a Utilitarian theory of justice. This is not the intention but merely an accidental coincidence.

thought will render a certain policy as just while another alliance will render it unjust, and there is so far no generally accepted satisfying solution to what perception of justice that is right. Wellbeing on the other hand is '*non-conflictive*'. Those disputes that exist are concerned with what it is that generates wellbeing or what policies are best for achieving it. Still they cannot be fully separated as a feeling of being justly treated is beneficial for wellbeing.

3.2. Conclusion

It is important to define those concepts that are essential in order to avoid misunderstandings and to enable measurements. Equality refers to similarity, in at least one aspect, and at the same time dissimilarity in others.

Equality has been, and still is, closely related to justice. This chapter presents three kinds of equality. The first two are numerical, which does not differentiate between people, and proportional which connects the amount of rightful claims to the amount of the aspect that is relevant for it. The third kind is equality in dignity which states that all persons are of equal dignity.

This thesis will focus on income inequality in the part that investigates the relation between inequalities and components of wellbeing. The normative part will try to separate equality from justice and base its claims on increments of wellbeing.

4. The importance of equality

Recent studies¹⁸ have concluded that the existence of inequality, and the repercussions that follows, are greatly deterring for wellbeing and rather works as a source for physical and mental illness.

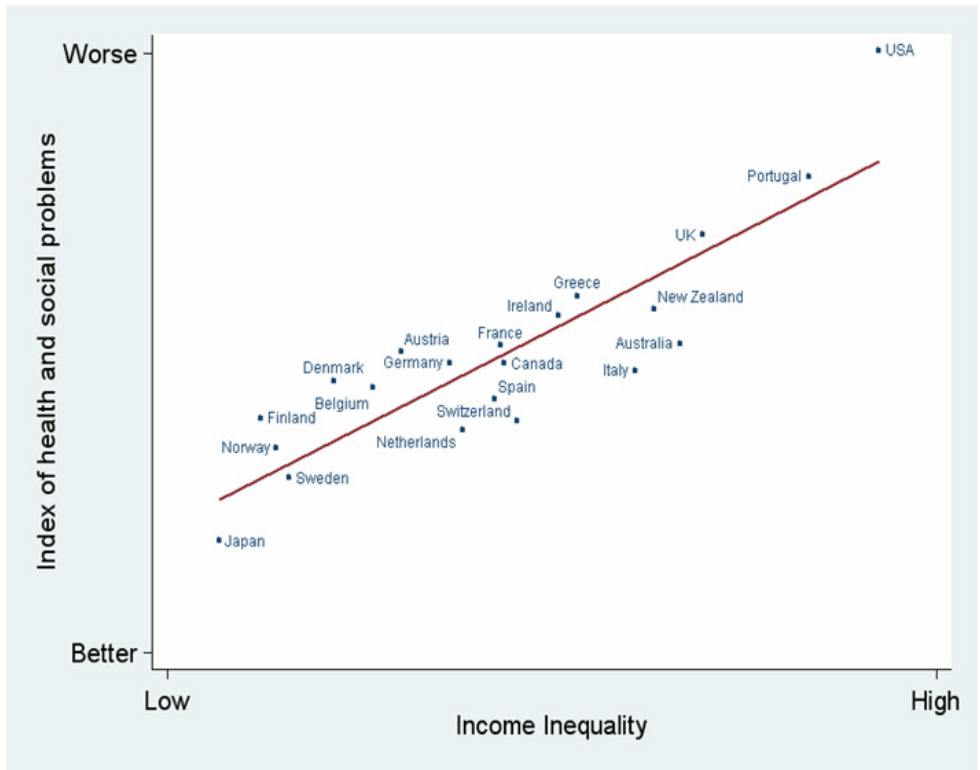
Graph 4.1¹⁹ below shows the relation between ‘Income Inequality’ and an index of health and social problems experienced within a set of developed countries. The index of health and social problem includes factors such as life expectancy, math & literacy, infant mortality, homicides, imprisonment, teenage births, trust, obesity, mental illness including drug and alcohol addiction, and social mobility. Those factors that are positive are calculated in a reversed manner i.e. the countries that experience the most trust will represent the lowest value on that variable. The set of countries is chosen to represent rich countries where the basic needs are covered for virtually the whole population. Graph 4.1 shows a strong positive correlation between the index of health and social problems on the one side and income inequality on the other. The correlation is strong enough to exclude the possibility of it being random. Graph 4.2 shows the relation between national income per person and the same index of health and social problems for the same set of countries as in graph 4.1. There is a correlation indicating that the higher the national income per person is the; less problems are experienced. This correlation is too weak to assure that it is not randomly caused, and it is contradicted by USA showing the highest level of income per person and also the highest level of problems experienced.

Inequality for these graphs is calculated by comparing the income for the richest 20% of the population with the income for the poorest 20%.

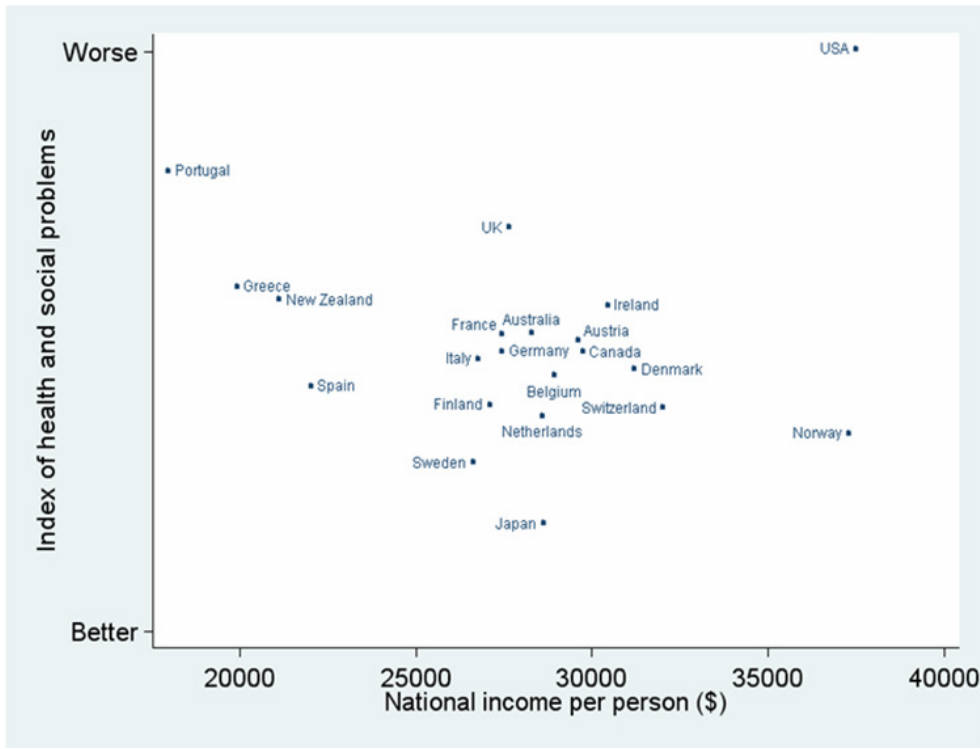
¹⁸ As referred to throughout this chapter.

¹⁹ R Wilkinson & K Picket, 2009

Data for calculating the graphs can be retrieved from: <<http://www.equalitytrust.org.uk/why/evidence/methods>>



Graph 4-1 Showing the relation between Income Inequality and an Index of health and social problems



Graph 4-2 Showing the relation between National income per person and an Index of health and social problems

When we compare the both graphs it becomes evident that income inequality is much stronger related to wellbeing than is national income per person for the set of developed countries. Still it should be mentioned that even though the population in the richest countries is not necessarily happier than the population in less rich countries, still there is a tendency for those who are rich within a society to experience less social and health related problems than the poor²⁰.

This chapter strives to explain the relationship between inequalities on one side and individual and social wellbeing on the other. It seeks to explain how inequality is related to some components of wellbeing, both mental and physical. Since all these components are reciprocally interrelated it is hard to isolate some effects to some spheres of life and society, still this chapter will be sectioned to give a better overview. Each section will first explain the importance of the topic under discussion. It will thereafter explore the empirically found relation it has to inequality before finally investigating the causality and trying to find reasons for it.

4.1. Confidence and anxiety

Several investigations and studies^{21,22,23} have concluded that the two most important aspects of wellbeing are close and trustful relations on one side and our perceived self image or our social self confidence on the other. This section will handle the latter while the first will be discussed in section 4.3.

²⁰ R Wilkinson & K Pickett, 2009, p. 38

²¹ E Diener & M Seligman, *Beyond Money: Toward an Economy of Well-Being*, University of Pennsylvania, 2004.

²² D Rowe, *How to Improve your Mental Well-Being*, London: Mind, 2002.

²³ E Diener & M Seligman, Very happy people, *Psychological Science*, no. 13, 2002 p. 80–83.

A person has to love and respect him or herself, and also feel loved and respected by other in order to obtain a good psychological health according to Maslow²⁴. He states that self-esteem brings with it optimism towards life and a feeling of deserving to be happy. Confidence is also the essence of building supportive and rewarding relations to others.

More recent studies^{25, 26} have started to emphasize the difference between self-esteem and self-love. High self-esteem is connected to a need of feeling superior, for self-assertion and for being content with oneself, which usually leads to narcissism. It becomes problematic when facing failure and it leads to a tendency to neglect negative feedback and to take less responsibility of own harmful actions²⁷. People with self-love can accept their own failures and see it as a normal consequence of being human. Self-love can also be seen as beneficial from a social view as it leads to a more tolerant population that does not need superiority in order to feel good.

There has in recent decenniums been an increase in anxiety²⁸ and a decrease in self confidence followed by an incapability to admit one's own weaknesses²⁹ experienced among young in the developed countries. People are becoming more sensitive to how they are perceived by others. The situations that bring the worst kind of stress and anxiety are situations in which our social image is threatened³⁰ and young people have a tendency to be on the watch against such situations at all times.

²⁴ A Maslow, *Towards a Psychology of Being*. Wiley, edition. 3, 1998, p. 89.

²⁵ S Safigan, 'Self-Kindness: A healthier Alternative to Self-Esteem?', *Positive Psychology News Daily*, 2010, retrived 15 December 2011, <<http://positivepsychologynews.com/news/steve-safigan/2010101513878>>

²⁶ D Mills, *Overcoming "Self-Esteem": Why Our Compulsive Drive for "Self-Esteem" Is Anxiety-Provoking, Socially Inhibiting, and Self-Sabotaging*, Albert Ellis Institute, 2003

²⁷ Ibid.

²⁸ S Collishaw, B Maughan, R Goodham & A Pickles, 'Time trends in adolescent mental health', *Journal of Child Psychology and Psychiatry*, vol.45 no. 8, 2004 p. 1350-1362.

²⁹ J Twenge, *Generation Me*, New York: Simon & Schuster, 2006.

³⁰ S Dickerson & M Kemeny 'Acute stressors and cortisol response: a theoretical integration and synthesis of laboratory research', *Psychological Bulletin*, vol. 130 no.3, 2004 p. 355-391.

Wilkinson and Pickett states that high and low status affects a person's confidence; of course there are exemptions but the general trend shows that higher status in society works as a protection for that person's self confidence³¹. This is according to them because of that we are evaluated after how well we perform and our social status is to some degree an indicator of our ability and our merit; those who do well and are successful will climb upwards in the social hierarchy while those who fail will decrease their status. Our status and our relative standing within the hierarchy is signalled to others through our belongings such as houses, cars, accessories, style and way of conduct; something that is recognizable at a glance. Scheff explains this as resulting from that we internalize how we believe others to see us, which in turn becomes a part of our confidence, especially in modern society that is full of new encounters and where the question of 'who' we are is constantly open³².

The more unequal a society is and the larger the difference is between the positions the more can we expect status to matter. As the gaps between poor and rich widen, they also become more evident and more of an element that is witnessed in everyday life.

“The emotional and cognitive effects of high levels of social status differentiation are profound and far reaching: greater inequality heightens status competition and status insecurity across all income groups and among both adults and children. It is the distribution of economic and social resources that explains health and other outcomes in the vast majority of studies.”³³

The increasing importance in status for more unequal countries can also be confirmed by the findings from a study conducted by UNICEF³⁴. The study shows that fifteen year old students tend to aspire towards more qualified occupancies in less equal countries. In Japan, being one of the most equal countries, 50 percentage of students state that they are satisfied with

³¹ R Wilkinson & K Pickett, 2009, p. 50.

³² T J Scheff, 'Shame and conformity: the defense-emotion system', *American Sociological Review*, vol. 53, 1988, p. 395-406.

³³ L Friedli, 'Mental health, resilience and inequalities', World Health Organization, 2009

³⁴ UNICEF Innocenti Research Centre, 'Child Poverty in Perspective: An overview of child well-being in rich countries' Florens: Innocenti Report Card, 2007.

obtaining low-qualified occupancies while in USA, one of the most unequal countries, approximately 15 percentage of students would settle for such occupancies.

The heightened competition for- and importance of status has the unconditional consequence of generating feelings of inferiority which is deteriorating for confidence. Media tends to depict abnormally beautiful as successful people who have high self esteem and who are secure in themselves. It's hard not to feel insufficient when evaluating oneself. Marketers take advantage from a sense of insecurity in order to promote some goods that are indicators of economic success. All this leads to a need of presenting oneself as successful and happy as well as an incapability of admitting weaknesses. As societies become more individualized and the quality of social relations are weakened, the reinforcing and confirming force for our identity and value from family and close friends is reduced making us more sensitive to our social statuses and other forms of affirmation.

4.2. Relations and trust

Trust in others affects both the wellbeing of individuals as well as the wellbeing of society as a whole. When we trust those around us we feel less anxiety and less worry. It is even proved that those able to trust others tend to live longer lives³⁵.

The main component of close relations, according to various studies^{36,37}, is trust which allows us to confide in others and creates an anticipation of benevolence and care, giving us a feeling of purpose that reaches beyond ourselves. The ability to confide in others is what constitutes rewarding social relations. Dr Lynne Friedli claims that:

³⁵ J C Barefoot, K E Maynard, J C Beckham, B H Brummet, K Hooker & I C Siegler, 'Trust, health and longevity', *Journal of Behaviour Medicine*, vol.21, no.6, 1998, p. 517-526

³⁶ J F Helliwell, 'How's life? Combining individual and national variables to explain subjective well-being', *Economic Modelling*, no. 20, 2003a, p. 331-360

³⁷ T C Antonucci, J E Lansford & H Akiyama, 'Impact of positive and negative aspects of marital relationships and friendships on well-being of older adults', *Applied Developmental Science*, no. 5, 2001 p. 68-75

“The significance of mental health and its role in our survival confirms the importance of humans as social beings: levels of social interaction are universal determinants of wellbeing across all cultures.”³⁸

Trust has benefits both on the individual level as well as for society as a whole. People that trust others tend to have more positive attitude towards democratic institutions, the participate more in civic organizations and take more part in politics. They tend to be more giving and tolerant towards people that are different from themselves. Besides this, trusting individuals tend to be happier and feel that they are more in control of their own life than those who are less trusting^{39,40}. On the social level trust has been associated with *“better working democratic institutions, more growth in their economies, and less crime and corruption”⁴¹*

Studies that compare countries to each other and that compare states in USA to each other both show a reliable relation between trust and equality⁴². Putnam⁴³ reaches the same conclusion: that social capital, which is an aggregate of the trust and the quality of social relations within a society, has moved collaterally with equality. Rothstein and Uslander⁴⁴ states that the low levels of trust and social capital observed in many countries is a result of governments reluctance towards inequality reducing policies.

Empirical studies also show that marriages that build on love are less common in unequal countries than in equal⁴⁵. People in unequal countries tend to choose their spouses depending on status to a higher degree than in equal countries.

³⁸ L Friedli, 2009

³⁹ J F Helliwell, 2002.

⁴⁰ J Delhey & K Newton, ‘Who trusts? The origins of social trust in seven societies’, *European Societies*, vol.5, no.2, 2003, p. 93-137.

⁴¹ B Rothstein & E M Uslander, ‘All for All: Equality and Social Trust’, *World Politics*, vol. 58, no. 1, 2005, p. 41-72.

⁴² R Wilkinson & K Picket, 2009, p. 62.

⁴³ R D Putnam, ‘Social capital: measurement and consequences’, *Canadian Journal of Policy Research*, vol. 2, no. 1, 2001, p. 41-51.

⁴⁴ B Rothstein & E M Uslander, 2005, p. 41-72.

⁴⁵ F Lim, M H Bond & M K Bond, ‘Linking societal and psychological factors to homicide rates across nations’, *Journal of Cross-Cultural Psychology*, vol. 36, no. 5, 2005, p. 515-536.

Twenge⁴⁶ shows that societies lose their trust and their social capital when inequality grows. He believes it to be the results of a system that evaluates persons after how they perform. When social capital and trust is eroded the standard of life becomes an indicator of status and also criteria for choosing friends⁴⁷. It might be hard to socialize between income groups as the choice of habits, hobbies and activities depend of affordability and those less wealthy might not be able to participate. When only socializing with person´s from the same standing in the statues hierarchy it creates a feeling of ‘we and them’, further alienating others and diminishing the ability to trust those outside of the own group as well as the ability to feel empathy for them.

Rothstein⁴⁸ makes a difference between in-group trust and generalized trust. In group-trust is trust toward those that are perceived as similar to one-self: usually coming from the same race and having the same level of income and education or similar believes and religious conviction. Generalized trust is trust for people that are different from us. It helps to create bonds across society. Generalized trust is according to Uslander the result of, as well as the cause for, egalitarian societies⁴⁹. It is closely related to social and economic equality: if wealth is equally distributed among the population then there is a greater feeling of having the same stake in the progression of society. Trust is connected to a belief that society shares a common fate and that persons have a responsibility for each other, it can be seen as part of a social conscience. This is further evinced by the fact that trusting people give more to charity and participate more in voluntarily undertakings⁵⁰. As mentioned trust allows us to anticipate benevolence and care from others and thereby also makes us regard others as worthy of the same treatment from us.

Studies conducted by Rothstein and Uslander⁵¹ show that activities in civic society are beneficial for trust, and can also work as an indicator of trustful societies. Still this

⁴⁶ J Twenge, 2006.

⁴⁷ F Lim, M H Bond & M K Bond, 2005, p. 515-536.

⁴⁸ B Rothstein & E M Uslander, 2005, p. 41-72.

⁴⁹ E M Uslander, *The Moral Foundations of Trust*. New York: Cambridge University Press, 2002.

⁵⁰ B Rothstein & E M Uslander, 2005, p. 41-72.

⁵¹ Ibid.

explanation is not comprehensive as it is shown as mostly referring to in-group trust since people tend to undertake civic and political activities together with those they consider as similar to themselves. In some ways it might even be deteriorating for generalizing trust as it can strengthen the ‘we and them’ mentality. Those countries that have achieved high levels of generalizing trust are countries in which the government has implemented policies that strive to create equality in opportunities by public education, gender equality, universal social programs and labour market projects to provide everybody with employment⁵². These undertakings send a signal of equivalence to the population.

4.3. Culture

How things are done (values and culture) and how things are distributed (economic and fiscal policy) are the key domains that influence and are influenced by how people think, feel and relate⁵³.

It is not only status with regard to wealth that matter; there are other nonmonetary factors that affect the popularity and perceived self-image among people. Still it is hard for an economically stratified society to maintain a culture of equality and equal value. It is believed⁵⁴ that the economic order of an area directs the evolution of the culture for that area. Competitive systems in unequal societies can thereby be seen as giving rise to more competitive cultures⁵⁵ where others are perceived more as competitors rather than companions, working for individual goals rather than common. It is also found that unequal

⁵² E Huber & J D Stephens, *Development and Crisis of the Welfare State*, Chicago: The University of Chicago Press, 2001.

⁵³ L Friedli, 2009

⁵⁴ This is one of the claims made by Marvin Harris, the founder ‘Cultural Materialism’: an anthropological orientation claiming that social life is directed by the nature practical necessities.

H Marvin, *Cultural Materialism: the Struggle for a Science of Culture*, Walnut Creek, California, 1979.

⁵⁵ This relationship is most probably reciprocal in the sense that culture also, to some degree, affects the organization of the economic system. Still it does not contradict the belief that competitive systems give rise to more competitive cultures.

societies are more oriented towards dominance while equal societies are oriented towards inclusion and empathy⁵⁶.

The graphs at the beginning of this chapter show that Japan, being the most equal with regard to income of the developed countries, is the country where the least amount of problem are encountered while USA, being the most unequal and with highest GDP per capita, shows the highest amount of social and health related problems. There are also large differences between Japanese culture and American culture. In Japan people tend to explain fortune and achievements as a result of circumstances and collective efforts rather than individual performances while failures are explained in a modest way by individual shortcomings. In USA the tendency is the opposite. Achievements and good results are caused by individual performance while failure is usually blamed on other factors beyond control of the actor⁵⁷. It gives evidence of two different cultures: one in which the role of the individual is less important and humbleness is the social norm, and one in which competition and performance gives rise to self-assertions. 'You can be all you want to be' and the 'American dream' for prosperity and success both give evidence of a culture in which performance and image are priorities.

4.4. Stress and obesity:

There are many sources for stress and many different kinds of stress. All kinds of stress can be seen as related to a form of worrying or anxiety. Stress is not only mentally exhaustive and unpleasant; it also has some undesirable physical effects. When we are faced with short periods of stress our performance is enhanced as a means of protection from threats. The chemical balance in our bodies is altered to improve our chances for survival. Usually this is beneficial for us if experienced for short moments but when the stress becomes chronic it becomes harmful. If the altered balance in our bodies is sustained for longer periods of time it

⁵⁶ J Sidanius & F Paratto, *Social Dominance*, Cambridge University Press, 1999

⁵⁷ S Kitayama, H Markus, H Matsumoto & V Norasakkunkit, 'Individual and collective processes in the construction of the self: self-enhancement in the United States and self-criticism in Japan', *Journal of Personal and Social Psychology*, vol. 72, no. 6, 1997 p. 1245-1267

will have adverse effects on our health for example by increasing the risk for cardiovascular diseases, infections and the speed of aging⁵⁸. High levels of stress and anxiety at an early age will inhibit the child's intelligence and health, as well as emotional and social development⁵⁹. Stress and anxiety will also affect our metabolism and helps our bodies both to store more fat and to concentrate it around the belly⁶⁰.

As inequalities widen the stress and anxiety related to performance and status is intensified, as seen in the section on confidence and anxiety. It is also found that obesity is correlated to income inequalities for adults and for children both in developed countries as well as in the different states in USA⁶¹. Part of the explanation comes from the fact that the average daily intake of calories is larger in more unequal countries and that physical inactivity is more common⁶² as well as that stressed people tend to eat more fast-food containing higher amounts of calories and less salads and fruits. Another part of the explanation is that there can be comfort in eating: people that suffer from mental problems such as depressions, anxieties and weakened self confidence can reduce their experienced discomfort momentarily by eating. Food can stimulate the mind of compulsive eaters in the same way that drugs do for addicts⁶³.

4.5. Education

"Whether You Believe You Can, Or You Can't, You Are Right" – Henry Ford

⁵⁸ L Vitetta, B Anton & F Cortizo, 'Mind-Body medicine: stress and its impact on overall health and longevity', *Annals of the New York Academy of Sciences*, vol.1057, 2005, p. 492-505.

⁵⁹ R Wilkinson & K Picket, 2009, p. 86.

⁶⁰ P Bjorntorp, 'Do stress reactions cause abdominal obesity and comorbidities?', *Obesity Reviews*, vol. 2, no. 2, 2001, p. 73-86.

⁶¹ R Wilkinson & K Picket, 2009, p. 102-105

⁶² A V Diez-Roux, B G Link & M E Northridge, 'A multilevel analysis of income inequality and cardiovascular disease risk factor', *Social Science and Medicine*, vol. 50, no. 5, 2000, p. 673-687.

⁶³ G A James, M S Gold & Y Liu., 'Interaction of satiety and reward response to food stimulation', *Journal of Addictive Diseases*, 2004:23 (3), 23-37.

Education has many advantages; the most obvious one is that education contributes to the progress of society. For the individual it is connected to higher work-satisfaction, higher chance of employment, better health, higher salaries, lower tendency for criminality and a higher propensity to participate in civic activities⁶⁴.

The average test-results in internationally conducted tests show that there is a correlation between equality and quality of education. The most equal countries tend to have higher scores in these tests and less people tend to drop out from school. The same trend is visible when comparing the different states of USA with each other⁶⁵. Another factor for high results in school is the education level of the pupil's parents. Those with higher educated parents score better in tests but this factor is also related to equality as the education level of the parents is of greater importance in more unequal countries; in equal societies it matters less⁶⁶.

There are many ways in which inequalities and stratification of societies can affect educational outcomes in an indirect way. As mentioned above, high levels of stress will affect the child's intelligence and social development. Good social relations and absence of anxiety gives a peace of mind that makes it is easier to learn. Less stressed parents have more time and energy to help their children and they can provide a more stable environment that is beneficial for the development of the child. A study conducted in USA showed that states where inequalities were increasing the most showed the highest level of divorces⁶⁷.

Paid parental leave is a way of equalizing society and allowing even those with lower income to spend more time with their children. It tightens the connection between the child and his or her parents creating a more secure environment for the child.

It is hard to believe that inequality could be directly related to achievements in school, isolated from environmental factors. Surprisingly there is such a relation that is evidenced by

⁶⁴ S Baum & K Payea, *Education pays: The benefits of higher education for individuals and society*, Washington, DC: College Board, 2004.

⁶⁵ R Wilkinson & K Picket, 2009, p. 116-119.

⁶⁶ Ibid.

⁶⁷ R H Frank & A S Levine, 'Expenditure Cascades', *Cornell University mimeograph*, Ithaca: Cornell University, 2005.

two experiments. In one of them two economists⁶⁸ randomly picked 321 boys in India at the age of ten and eleven. The boys were to solve a set of problems with mazes, first without knowing the caste of each other. Thereafter they had to solve some similar problems after presenting themselves and telling the other which caste they were from. At the first instance, the boys from lower casts managed slightly better than those from higher casts, but after presenting themselves, those in higher casts performed noticeably better. In the other example⁶⁹ a school teacher told her pupils that a new scientific study had concluded that those with blue eyes are more intelligent and have better chances of becoming successful while dark eyed persons are lazy and dumb. She then divided the class into groups according to eye color and gave the blue eyed pupils extra attention and praise. The blue eyed group started asserting their superiority, treating the brown eyed group badly and improving their results remarkably. The brown eyed group quickly became inept and their performance deteriorated. After a few days she informed the class that she had misunderstood the study and that it was in fact the brown eyed pupils that are more intelligent and talented. The situation in the class room was quickly reversed. Other studies have shown that the same tendencies are valid for persons from different genders, races and ethnical groups⁷⁰. Obviously it is a result of subjective inferiority that affects the confidence of the pupils.

Neurological studies have shown that we are most capable of learning when we are sure that we will be successful. A feeling of confidence and happiness makes the brain release dopamine that improves our memory, attention and ability to solve problems. If we are stressed and feel insufficient the brain will release a substance called cortisol that has inhibiting effects on our brain activity and memory⁷¹. In this way inequalities also affect education results by affecting the aspirations and confidence among those who perceive themselves as being in the lower stratum of the social hierarchy.

⁶⁸ K Hoff & P Pandey, 'Belief systems and Durable Inequalities: An experimental investigation of Indian caste', *Policy Research Working Paper*, Washington, DC: World Bank, 2004.

⁶⁹ W Peters, *A Class Divided: Then and Now*, New Haven: Yale University Press, 1987.

⁷⁰ S J Spencer, C M Steel & D M Quinn, 'Stereotype threat and women's math performance', *Journal of Experimental Social Psychology*, 1999:35 (1), 4-28.

⁷¹ J Zull, *The art of Changing the Brain: Enriching the practice of teaching by exploring the biology of learning*, Sterling, Stylus Publishing, 2002.

4.6. Violence and crimes:

The negativity of violence and crimes is obvious, but sometimes the fear of violence and crime can be just as big a problem as the violence itself. Many persons feel fear when they are walking outside at night. Some people even feel fear and insecurity at daytime or when they are inside their own homes. People are often told not to open the door for a stranger and not to let unknown persons into their building, even if they claim there to be an emergency. The presence of violence and crime is greatly deteriorating for trust, compassion, freedom and the ability to establish new connections. In areas where the fear of violence is high, people are deterred from taking actions for the good sake of society and they feel helpless and less in control of their own situation⁷². Violence is less frequent in areas that are characterized by high levels of trust.

A lot of statistics and many studies all reach the conclusion that murders are more frequently occurring where there are inequalities. This is both valid in comparisons between countries as well as between states in USA⁷³. It is not only murders that are expressions of violence. A UNICEF report⁷⁴ about the wellbeing of children also measures how frequently children experience themselves being victims of bullying, of physical violence and of intimidating behaviour. The index of these three variables was tried against income inequalities for the same countries and a convincing correlation was found. Exposure to violence during the childhood is a strong predictor of violent behaviour in later parts of life. The same correlation is also visible between the amount of policemen and security forces per 100,000 citizens and inequality⁷⁵.

We can also see that the fraction of the population that is imprisoned at a given moment corresponds to the amount of inequality, both between countries as well as over time. This correlation is only partly a result of higher levels of criminality but mostly explained by

⁷² R Wilkinson & K Picket, 2009, p. 149

⁷³ R Wilkinson & K Picket, 2009, p. 144-145

⁷⁴ UNICEF Innocenti Research Centre, *Child Poverty in Perspective: An overview of child well-being in rich countries*, Florens: Innocenti Report Card, 2007.

⁷⁵ United Nations Crime and Justice Information Network, *Survey on Crime Trends and the Operation of Criminal Justice Systems (Fifth, Sixth, Seventh, Eighth)*, New York: FN, 2000.

stratified societies having a stronger ‘we and them’ mentality leading to harsher measurements against convicted felons⁷⁶. The general attitude of society is more penalizing and less emphatic.

James Gilligan⁷⁷ claims that violence is an attempt at averting or eliminating a feeling of shame and humiliation and replacing it with a feeling of pride. As mentioned, the worst kind of stress comes from fear of losing face and sometimes violence is seen as the only way of preventing it, especially in more ‘macho’ cultures. It explains why act of violence is disproportionately conducted by young males from the lower stratum of the social hierarchy. These young males have few other ways to assert their status and smother the feeling of deprivation.

In wealthier areas people don’t feel the same need of responding to insults by violence. Their status is not to the same degree depending on their integrity and insults are therefore not as strong blows to their status and pride since in these areas people tend to connect their status to wealth and other attributes⁷⁸. In poor areas, where it is hard to obtain status from other sources, it is not surprising that a culture is developed that react so strongly to such insults. This is why violence and intimidating behaviour can be a way for some individuals to assert themselves against persons that show signs of higher social status in other aspects. It is not a direct result of inequality but rather a result of a relative deprivation which in turn is a result of stratification.

4.7. Social mobility

Social mobility refers to the populations possibilities to change their status and position in the social hierarchy. It can be seen as an indicator of equality in opportunity that extends beyond the notion of formal equality but also incorporates the real possibilities provided by the composure of society. It is highly beneficial as it can help to raise the aspirations of those

⁷⁶ R Wilkinson & K Picket, 2009, p. 157

⁷⁷ J Gilligan, *Preventing Violence*, New York: Thames & Hudson, 2001.

⁷⁸ R Wilkinson & K Picket, 2009, p. 160

born in less fortunate circumstances and fill them with hope and belief that improvement is possible. It is also ambition sensitive in the way that people are rewarded after the efforts that they apply; if they try hard enough then they can achieve.

One way of measuring social mobility is to see to what degree children's future income and social position is dependent on their parents' income and social position. Unfortunately such data is only available for a small number of countries as it dictates for studies extending over decades⁷⁹. Still the trend is apparent: more equal countries have higher levels of social mobility. Studies within USA and the UK show that social mobility has moved in a similar manner as equality over time⁸⁰.

Equal countries tend to invest more into undertakings that promote everyone's equality in opportunity such as free education - especially at post-graduate levels -, universal welfare schemes and support for needy. It all results in a society where those least fortunate have better chances to improve their situations. Another explanation is that more stratified societies are more segmented. Those who grow in areas where a majority of the population is poor and relatively uneducated⁸¹ tend to inherit the mentality, culture and values of that society. It all affects their aspiration and their confidence in the ability to improve their situation. Their pride, as a means of psychological self defence, is tied to aspects distinct from those of the rest of society.

4.8. Poverty

It is not only the feeling of relative deprivation that is problematic. Inequalities in income and wealth lead to a system of distribution that results in poverty. Even though poverty is much more harmful for developing countries where it is connected to starvation and malnutrition, it still is problematic for many rich countries as well.

⁷⁹ R Wilkinson & K Pickett, 2009, p. 168

⁸⁰ J Blanden, P Gregg & S Machin, *Intergenerational mobility in Europe and North America*, London: Centre for Economic Performance, London School of Economics, 2005.

⁸¹ As well as those growing up in more affluent areas

As mentioned before: unequal societies are oriented towards dominance while equal societies are oriented towards inclusion and empathy. Equal countries tend to be willing to give more in aid and contribution and people within equal societies are more willing to give donations and participate in voluntary activities⁸².

4.9. Analyzes

The study presents us with three different sources of adversity springing from inequality.

The first kind is that stratification brings with it competition for status and positions in the social hierarchy. As we have seen, the competition becomes intensified as inequalities increase and become a more noticeable part of society. This competition and worrying about status is stressful and gives rise to anxiety, even for those at the top who have to match the expectations of their position, as well as for those at the bottom striving to get up. A perceived belief that the value of a person is connected to his or her status will arise as those wealthier and more successful will have more freedom, be better treated and are able to present themselves in a more respectful way. *Inequality leads to stratification and people become stressed about their status.*

The second kind is that inequality, by necessity, makes a part of the population relatively subordinated. It brings with it a subjective feeling of inferiority which leading to a set of adverse effects; most noticeable it affects the performance within the educational system and the level of violence within a society. It might have some positive effects as well. The experiments that are referred to in the chapter concerning education showed that those who felt superior performed better. Still the experiments does not exclude the possibility that it is confidence and a belief in the own ability that made the students perform better. It is plausible to think that this also could be achieved in an awareness characterized by equality. It is not necessary to feel that some others are inferior just to believe in oneself. Still a feeling of superiority can give a boost to the confidence and in such a way have positive implications. It

⁸² B Rothstein & E M Uslander, 2005, p. 41-72

is quite evident that even though there can be some positive effects they are greatly outweighed by the negative. *Relative subordination leads to a subjective feeling of inferiority.*

Third kind of adversity is that inequalities lead to segmentation and absolute deprivation. Areas are created for poor and for rich. People growing up in poor areas tend to inherit the values and mentality that is prevailing within that society which in turn can diminish their chances for improvement. Those who despite this manage to prevail will move to better areas while those who fail in more affluent areas will move to the less regarded ones. The problem is not solved, just reproduced. Poverty is also a huge problem in many parts of the world where it leads to starvation, diseases and malnutrition. *Inequalities lead to poverty*

It is not inequality with regard to income that is the only cause of all the adverse effects but rather a belief and a culture that reproduces the belief that the value of a person is connected to his or her position in the income hierarchy. For the rich countries the foremost source of adversity is a subjective feeling of difference in value. For developing countries the situation is different as inequalities lead to starvation and poverty.

It is clear that inequality correlates with numerous adverse effects as described above. Still the direction of causality is not as obvious. The explanations for the adverse effects give some evidence of reciprocity: inequality contributes to the effects while the effects contribute to inequality. Education and social mobility, for example, are more prevalent in stratified societies while their existence prevents the societies from becoming more equal. We have seen that those who have an inferior self-image will perform worse in school and can therefore be expected to have lower paid occupations. We have also seen that segmentation creates a 'we and them' mentality that promotes a tendency towards domination and prevents a will for inclusion and empathy which in turn can lead to public opinion directing policies towards even more stratification. Furthermore the tightened status competition witnessed in more unequal countries widens the subjective perception of dissimilarity.

For other effects such as diminished trust, deteriorated relations, changed culture and weakened confidence we have more clues pointing at inequality being the cause. Still we cannot exclude the possible existence of another factor giving raise to both the inequality as

well as the alleged effects. It is important to explore such a possibility in order to know what remedies there can be to inequality and the adverse effects.

Culture could be such an explanation. Still I do not find it adequate. Culture can help to explain why inequalities affect different countries differently i.e. why there is not a perfect correlation to the alleged effects. Still I have chosen not to focus on culture as an explanation since culture is such an elusive notion containing a variety of elements and having several possible interpretations.

Another explanation that is found more probable is that competition gives rise to both inequalities and the adverse effects observed. It could explain the three roots of adversity that are listed above.

We can expect a competitive system, especially an economic system that constitutes the environment in which we conduct a big part of our activities and which forms the nature of those relation and encounters, to affect our mentality and lead to a more competitive culture in which people are inclined to assert themselves and be more reluctant to admit their weaknesses and shortcoming⁸³. If the economical system and culture is performance-oriented then performance and ability will be of greater importance. The necessity for self-assertion will be stressful and the importance of status will increase. Not only status with relation to income but also with regard to appearance, popularity, strength and other. It not surprising that it becomes a source of stress and anxiety.

An ability-sensitive system will distinguish those more able from those less able with regard to occupational success. This idea of diverse value can be expected to spread and also permeate other spheres of society. When people are being evaluated some will feel superior while others feel inferior and those successful in one sphere of life can still feel that they are inadequate in another sphere.

Inequalities arise and increase as some prevail and some fail within the competition. Those wealthy will find it much easier to increase their wealth as they will have resources to invest.

⁸³ This corresponds to the differentiation between self-esteem and self-love, directing persons towards the first rather than the latter.

Those in poverty are usually forced to take loans and spend more of their income on repayments. Over time the divergence will grow as a result of the functioning of society if there are no genuine attempts at equalization. Competition for resources and for property will allocate the resources and property to those most successful in the competition. This is valid between countries and within countries. Those who lose the competition will be without resources and property and therefore forced to comply with the conditions of set by those who are more affluent.

Of course all adversity cannot be ascribed to competition per se. Still competition, in the free-market, system leads to unlimited inequalities in possession and also amplifies the negativity of subjective differentiation in value.

4.10. Conclusion:

There are three main types of adversity that are connected to inequality. The two first are arising from a perceived belief that a person's value is connected to his or her ability and performance. Stress and anxiety arise as people compete for status and stratification will bring with it a sense of inferiority. The third kind of adversity is that competition over resources and property will lead to poverty and deprivation.

A competitive economic system can be seen as a credible explanation for both inequality and the effects that are connected to it. Competition puts focus on ability and performance. It works to differentiate those more able from those less able and reward the successful. It will also allocate resources and properties to those who succeed in the competition over them.

5. Guidelines for Equality

“Only where there is pecuniary equality can the distinction of merit stand out.”

– George Bernard Shaw

This chapter will first describe two types of equality that are used by other institutions in their attempt to incorporate equality and explore on which type that is most appropriate to pursue given the findings in the previous chapter. It will thereafter consider which policy-areas that are most relevant for the incorporation of equality and consider the meaning of equality in regard to these areas.

5.1. Two conceptions of equality

The introduction presents two different conceptions of equality; I've chosen to refer to them as substantive equality and procedural equality.

Substantive equality can be found in the Swedish National Agency for Education's ambition of providing everyone with an enjoyable environment. It recognizes some pupils need for extra attention and care in order to make their time at school equivalent to the time of others. The purpose is not to achieve some higher value or agenda like productivity or high grades; it's rather recognizing these pupils value as ends or as goals in themselves. They are as humans entitled to an environment free from discrimination, abuse and bullying, just like everyone else that possess the quality of being human. From a value-oriented perspective we can recognize that their value is not tied to their qualities or capability to contribute beyond themselves; their value derives from them being sentient. The principle of treating everyone the same needs to be compromised in order for everyone to attain the same level of enjoyment.

*Procedural equality*⁸⁴ is exemplified in the introduction by the idea of equality in opportunity. The same conditions and terms are effectual for everyone, without differentiation. People are not seen as ends in themselves –at least not directly- but rather seen as means for achieving some other value or goal. The purpose of equality in opportunity is to allow for competition to single out those individuals who will carry out a task or occupy a position in a way that best achieves the purpose of that task or position, making the outcome of the task the end or goal while rendering equality to be the absence of arbitrary discrimination or favouritism. In this instance the relevant aspect for proportional equality for the competitors refers to their ability, skill, knowledge or other characteristic that enhances their performance while numerical equality derives from the principle that everyone is prone to the same conditions when competing even though they don't have the same capabilities.

There are also systems where both conceptions of equality are effectual. Representative democratic societies grant all citizens with one vote each given that they fulfil some prerequisites concerning age and nationality. It is substantive equality in the sense that everyone holds an equal vote regardless of intelligence, knowledge, education or moral dignity while it is procedural in the sense that everyone is subject to the same prerequisites for being eligible to vote and that everyone is free to compete for those positions that are appointed through these elections. The substantive equality in this case can be seen as originating from the idea that everyone has an equal stake in society; everyone submits their unconditional freedom and self-determination to the will of the majority in order to enable a structured cooperation and coexistence that will be of mutual benefit.

As concluded in the previous chapter, the most important aspect of equality for rich countries is a subjective feeling of equality in value and worth. Both substantive and procedural equality have their advantages and disadvantages for this end. Substantive equality that is achieved by dissimilar treatment might bring with it a sense of inferiority for those who are in need of extra support still it might be necessary to achieve equality in outcome. Procedural equality, in turn, does not guarantee that the outcome is equal. The inequality in outcome can be seen as precluding a subjective feeling of equality and value and worth.

⁸⁴ We can find Aristotle's distinction between numerical and proportional equality within this sub-category

Another important aspect of equality is that inequalities can lead to poverty and deprivation. For this end a substantive form of equality that guarantees an equal outcome has to be sought. Procedural equality is inadequate for this task since it can lead to inequalities with regard to income and wealth. We can, for example, witness how equality in opportunity has led to vast inequalities in many countries.

To conclude; it could be said that substantive equality is the main target as it considers people as ends. It also has the benefit of constituting the foundation for a subjective perception of equality in value by achieving material equality. Procedural equality usually refers to matters that are external to the person and should therefore only be sought when it helps to promote substantive equality. Still such a distinction is not universal and the particularities of the matter in question have to be taken into consideration.

5.2. Policy-areas

I found it most appropriate for equality to be incorporated through the structuring of the economic institution, the judicial institutions and the educational institution. This is because these are the structured and regulated institutions, that are under public control, with the most influence on our lives and hence our wellbeing. They constitute the foundation of our society. These are also the institutions that are most directly within the domain of political science. Their influence reaches into all spheres of human life and human interaction. If equal value of all humans is to be taken seriously, then it is to be done through these institutions.

The economic institution and the educational institution are controlled by the laws that are stipulated in the judicial institution. The judicial institution can therefore be regarded as constituting the foundation for these other institutions and consequently as being of greatest importance. Still I'd like to propose for the economic institution to be prioritized since it determines the nature of the environment in which we spend most of our time and to which we apply most of our efforts. This is also as the economic institution is the one closest related to material inequalities.

The educational institution is of great importance and it has a substantial effect on us as it occupies such a big part of our early year, when we are the most responsive to new influences. It is during this period that we get our values and our apprehension of what is right and what is wrong. It is also an important policy area since many countries have compulsory schooling and it is something that all citizens will undergo. It will be hard to change those values that are taught in the early years.

5.3. Economic equality

“Equality of opportunity is an equal opportunity to prove unequal talents.”

- Viscount Samuel

The economic institution of a certain area is concerned with the management of its resources, including the efforts applied by its population. It governs and regulates production, trade, distribution and consumption of goods and services. The structure of the system determines the rules for assigning tasks and for allocating goods and services; with other words who will produce what and who gets to consume what. The fairness and underlying values with regard to these two questions are usually the main aspects when justifying the arrangement of the system.

We all play two roles in the economic institution; we are producers and we are consumers, we are means of production as well as ends of it. These two roles are interrelated; what we produce usually determines what we will consume. We also possess different ability to contribute to the production of goods and services. We are all born with dissimilar talents, intelligence and strength, this makes us suitable for different tasks and it makes us perform these tasks with varying success. As consumers we are also different: we have different needs and we have different desires.

Equality in income as a guideline is quite straightforward as it is easily understood and measured⁸⁵. It is harder to achieve a feeling of equality in value when we all possess different talent, intelligence, ability and social skills. In order to achieve such subjective equality it is important not to connect the value of a person to those characteristics. For people to get a subjective feeling of equality in value we will need to know how the value of a person is being recognized. In order for that recognition not to be connected to those attributes, recognition has to – in the optimal case - originate from something that is equal for all.

The most common way to recognize value within the economic institution –as far as I can see it – is through the amount of entitlements that a person is assigned⁸⁶. Usually this is represented through pecuniary compensations. The amount of entitlements and rights should not depend on the skills, strength, knowledge, intelligence or any other characteristic related to that person's capability to produce since it would by necessity lead to an unequal distribution. Of course it could be considered that those less productive have to work more in order to compensate and produce the same value as others, and that such a system would be able to incorporate an equality of value. Still this idea is to be opposed as it would see the time of some as worth more than the time of others. Even though this is not on an arbitrary basis, still it would preclude a substantive equality. The time applied by a person has to be regarded as equivalent to the time applied by another person for them to be regarded as being of equal substantive value⁸⁷.

Another way of avoiding a connection between talents, abilities and value is by diminishing the importance and the role of competition. As concluded is the previous section, competition can have an amplifying effect on the negativities of inequality. It is also crucial that everyone gets the possibility of obtaining an employment through which they can contribute and feel valuable for society.

⁸⁵ It is not being claimed that the implementation of equality in income will be easy, just that it is easier to understand it and to control it.

⁸⁶ This comprehension is based on that these compensations are related to the perceived status of that person and that they allow for better treatment, more options and more possession.

⁸⁷ A community in USA have tried to use hours of labour as an alternative currency. For more information see www.ithacahours.com

It can be thought that the general attitude towards- and comprehension of a person's value depends on the how this value is recognized. A system which reduces inequalities in income and material possessions while working to diminish the importance of competition and its outcome will send a signal of equality in value.

5.4. Juridical equality

The judicial institution is concerned with constituting the rules and terms for coexistence, securing their adherence, solving disagreements and prescribing penalties for those who break the laws. The design of these rules determines what is right and wrong in society, and thereby works as an indicator, as well as a reproducer, for those values which it guards. In the judicial institution we are all subjects. To be of equal value here is the same as being of equal dignity i.e. worthy of the same respect. The main point here is avoidance of arbitrary discrimination.

Substantive equality is most relevant when it comes to constituting the rules and terms for coexistence and, as already mentioned, the economic institution is of main significance due to its importance for our living conditions. Focus should be put on constructing a society in which the quality of education, healthcare, protection, care and other factors that impact on the quality of life are the same for everyone as it can be seen as leading to a subjective sense of equality in value.

In solving disagreements or determining penalties for those who have failed to adhere to the rules it is important that both parties of the disagreement, as well as the prosecution and defence in all cases, are of equal strength. It's critical to avoid advantage or disadvantage due to economic power and the ability to obtain a better or worse lawyer. To achieve this there has to be economic equality or a system in which judicial representation is allocated in a way which is not connected to wealth or influence: the first being more suitable with regard to the discussion in the previous section. Being treated equally by the judicial system is clearly an indicator of equality; in its absence it would be almost impossible to achieve a subjective feeling of equality in value.

5.5. Educational institution

The word education descends from the Latin word 'ēducātiō' which means bringing up, training and leading⁸⁸. It reflects well the purpose of the educational system as its purpose is to give us the knowledge and the skills that we need throughout our lives, to educate us for those occupancies that we will later carry out and to contribute to- as well as direct social development.

For the educational system to incorporate equality, the substance- and way of teaching has to reflect those values. Equal value has to be taken for granted to achieve an attitude in which everyone has a subjective feeling of being equals. It is undeniable that some pupils have easier to learn while some experience more resistance leading to that some will perform better than others. The speed of progression should, in the optimal situation, depend on the ability of the student without his or her performance being perceived as constituting his or her value.

I don't believe it to be enough to offer everyone an equal quality of education just because it gives everyone an equal opportunity at prevailing: as we all possess different capabilities this would lead to an unequal outcome. Instead it is like in the economic institution that inequalities have to be accepted but not connected to value. The main importance is in the attitude which is achieved through culture.

5.6. Conclusion

A distinction can be made between substantive equality and procedural equality. Substantive equality strives to achieve an equal enjoyment for persons while procedural constitutes the same formal conditions. Substantive equality is the main target as it considers people as ends and as it can be seen as constituting the foundation for a subjective feeling of equality in value as well as equality in income and possession.

⁸⁸ Etymonline, *Online Etymology Dictionary*, Retrived 20 Deceember 2011, <<http://www.etymonline.com>>

The most relevant policy areas for incorporating equality into society are the economic, juridical and educational system of that society. This is as these policy-areas have the most significant impact on our lives and coexistence.

In the economic institution, to achieve equality, it is important not to connect the abilities of a person to his or her value. In the judicial institution equality is obtained through providing everyone with the same quality of education, healthcare protection, care and other factors that impact wellbeing. It is also crucial that both parties, in a dispute, are of equal strength when reaching a verdict. The substance and way of teaching, within the education institution, have to take equal value for granted to achieve a subjective feeling of equality in value. The system has to tolerate that pupils have different ability to learn without connecting their value to it. In the optimal case, the progression of student will be determined by his or her ability to learn.

6. Discussion

Equality and justice have always been closely related topics. There are different comprehensions concerning which persons or which cases that are to be considered as equal and how they are to be equally treated. Earlier theories saw some people as superior and some as inferior due to their strength, pedigree, wealth etc. The current consensus on the other hand is that all people are equal in value and dignity even though there exists wide debate regarding the practical consequence that follow.

Few would openly oppose the idea of all persons being of equal value; still many opposes implementing policies and other means of equalizing the living conditions of people. This is perhaps because equality is not the only value pursued and because it is believed that inequalities are beneficial or even necessary from a wider perspective.

Economic progress and increments in GDP have for a long time been the prime indicator of success and advancement for nations, probably as wellbeing used to depend on these values as ones material belongings could be used to cover the basic needs for food and shelter. Recently, focus has shifted and the importance of emotional wellbeing is more and more recognized as a concern as the basic needs are being covered for almost all persons living in the rich countries. The result is that many recent studies concerning equality have considered its impact on wellbeing and its components rather than wealth.

The psychological benefits of material equality evince its importance for societies as well as for individuals. It is clearly shown that more equal societies experience less problems with health and crime, they have better unity, are more trustful, less stressed and anxious, and mentally healthier. More unequal societies are more stratified and ones position in the social hierarchy relevant to others becomes more noticeable and a greater concern. This leads to people being more anxious about their status and more eager to assert themselves.

Competition and a competitive mentality can be seen as further increasing the perceived need for self-assertion as well as the anxiety connected to status and image. The more stratified that a society is the more does ability seem to matter and be connected to position; something that

can be expected to permeate all spheres of life. It is not proved that competition has this effect and it should for this reason be interesting to carry out studies that seek to measure how competitive the culture of different countries is and to try it against the index of social and health related problems that is used within this thesis.

For a society to pursue equality, it is best done through the economic, juridical and educational institutions. As we are all different and possess different abilities and talents we should strive for diminishing the relation these abilities and talents have to the compensation for our efforts. Equal incomes work as a prerequisite for a sense of equality in value, especially when our wealth and income is connected to how we are treated, what possibilities we have and how others consider us. It can also be beneficial to try to decrease the role competition has and the competitive mentality in general as it works to evaluate people and therefore leads to subjective inferiority. It is also crucial that people are treated in the same manner by the juridical institution and that there is no difference in strength between the parties of a quarrel. The educational system plays a big role in our upbringing and is a major influence during those years in which we get our apprehension of what is wrong and what is right. It is therefore important that the education reflects an attitude of equality in value while at the same time letting the capabilities of the students be the main determinants of the rate of their progress.

7. List of references

Books and articles:

T C Antonucci, J E Lansford & H Akiyama, 'Impact of positive and negative aspects of marital relationships and friendships on well-being of older adults', *Applied Developmental Science*, no. 5, 2001 p. 68–75

Aristotle, *Nicomachean Ethics*, p. 1130b-1132.

Aristotle, *Politics*, p. 1282

J C Barefoot, K E Maynard, J C Beckham, B H Brummet, K Hooker & I C Siegler, 'Trust, health and longevity', *Journal of Behaviour Medicine*, vol.21, no.6, 1998, p. 517-526

S Baum & K Payea, *Education pays: The benefits of higher education for individuals and society*, Washington, DC: College Board, 2004.

P Bjorntorp, 'Do stress reactions cause abdominal obesity and comorbidities?', *Obesity Reviews*, vol. 2, no. 2, 2001, p. 73-86.

J Blanden, P Gregg & S Machin, *Intergenerational mobility in Europe and North America*, London: Centre for Economic Performance, London School of Economics, 2005.

S Collishaw, B Maughan, R Goodham & A Pickles, 'Time trends in adolescent mental health', *Journal of Child Psychology and Psychiatry*, vol.45 no. 8, 2004 p. 1350-1362.

J Delhey & K Newton, 'Who trusts? The origins of social trust in seven societies', *European Societies*, vol.5, no.2, 2003, p. 93-137.

S Dickerson & M Kemeny 'Acute stressors and cortisol response: a theoretical integration and synthesis of laboratory research', *Psychological Bulletin*, vol. 130 no.3, 2004 p. 355-391.

E Diener & M Seligman, *Beyond Money: Toward an Economy of Well-Being*, University of Pennsylvania, 2004.

E Diener & M Seligman, Very happy people, *Psychological Science*, no. 13, 2002 p. 80–83.

A V Diez-Roux, B G Link & M E Northridge, 'A multilevel analysis of income inequality and cardiovascular disease risk factor', *Social Science and Medicine*, vol. 50, no. 5, 2000, p. 673-687.

R H Frank & A S Levine, 'Expenditure Cascades', Cornell University mimeograph, Ithaca: Cornell University, 2005.

L Friedli, 'Mental health, resilience and inequalities', World Health Organization, 2009

J Gilligan, *Preventing Violence*, New York: Thames & Hudson, 2001.

J F Helliwell, 'How's life? Combining individual and national variables to explain subjective well-being', *Economic Modelling*, no. 20, 2003a, p. 331–360

K Hoff & P Pandey, 'Belief systems and Durable Inequalities: An experimental investigation of Indian caste', Policy Research Working Paper, Washington, DC: World Bank, 2004.

E Huber & J D Stephens, *Development and Crisis of the Welfare State*, Chicago: The University of Chicago Press, 2001.

G A James, M S Gold & Y Liu., 'Interaction of satiety and reward response to food stimulation', *Journal of Addictive Diseases*, 2004:23 (3), 23-37.

E Kant, *Metaphysics of Morals*, 1797 p. 230

S Kitayama, H Markus, H Matsumoto & V Norasakkunkit, 'Individual and collective processes in the construction of the self: self-enhancement in the United States and self-

criticism in Japan', *Journal of Personal and Social Psychology*, vol. 72, no. 6, 1997 p. 1245-1267

F Lim, M H Bond & M K Bond, 'Linking societal and psychological factors to homicide rates across nations', *Journal of Cross-Cultural Psychology*, vol. 36, no. 5, 2005, p. 515-536.

H Marvin, *Cultural Materialism: the Struggle for a Science of Culture*, Walnut Creek, California, 1979.

A Maslow, *Towards a Psychology of Being*. Wiley, edition. 3, 1998, p. 89.

D Mills, *Overcoming "Self-Esteem": Why Our Compulsive Drive for "Self-Esteem" Is Anxiety-Provoking, Socially Inhibiting, and Self-Sabotaging*, Albert Ellis Institute, 2003.

R Nozick, *Anarki, stat och utopi*. 1974

W Peters, *A Class Divided: Then and Now*, New Haven: Yale University Press, 1987.

R D Putnam, 'Social capital: measurement and consequences', *Canadian Journal of Policy Research*, vol. 2, no. 1, 2001, p. 41-51.

B Rothstein & E M Uslander, 'All for All: Equality and Social Trust', *World Politics*, vol. 58, no. 1, 2005, p. 41-72.

D Rowe, *How to Improve your Mental Well-Being*, London: Mind, 2002.

T J Scheff, 'Shame and conformity: the defense-emotion system', *American Sociological Review*, vol. 53, 1988, p. 395-406.

J Sidanius & F Paratto, *Social Dominance*, Cambridge University Press, 1999

S J Spencer, C M Steel & D M Quinn, 'Stereotype threat and women's math performance', *Journal of Experimental Social Psychology*, 1999:35 (1), 4-28.

J Twenge, *Generation Me*, New York: Simon & Schuster, 2006.

E M Uslaner, *The Moral Foundations of Trust*. New York: Cambridge University Press, 2002.

L Vitetta, B Anton & F Cortizo, 'Mind-Body medicine: stress and its impact on overall health and longevity', *Annals of the New York Academy of Sciences*, vol.1057, 2005, p. 492-505.

R Wilkinson & K Pickett, *Jämlikhetsanden: Därför är mer jämlika samhällen nästan alltid bättre samhällen*, Karneval Förlag, 2009, p. 27

J Zull, *The art of Changing the Brain: Enriching the practice of teaching by exploring the biology of learning*, Sterling, Stylus Publishing, 2002.

Myndigheter:

Myndigheten för skolutveckling, *Olikas lika värde: om arbetet mot mobbning och kränkande behandling*. 2003., Stockholm: Myndigheten för skolutveckling.

UNICEF Innocenti Research Centre, '*Child Poverty in Perspective: An overview of child well-being in rich countries*' Florens: Innocenti Report Card, 2007.

United Nations Crime and Justice Information Network, *Survey on Crime Trends and the Operation of Criminal Justice Systems*, (Fifth, Sixth, Seventh, Eighth), New York: FN, 2000.

United Nations Office of the High Commissioner for Human rights, *Universal Declaration of Human Rights*, 1948.

Internet:

Etymonline, Online Etymology Dictionary, Retrived 20 Deceember 2011,
<<http://www.etymonline.com>>

Inequality.org, *World / Global Inequality*, 2011, retrieved 12 December 2011,
<<http://inequality.org/global-inequality/>>

S Safigan, 'Self-Kindness: A healthier Alternative to Self-Esteem?', *Positive Psychology News Daily*, 2010, retrived 15 December 2011,
<<http://positivepsychologynews.com/news/steve-safigan/2010101513878>>

Stanford Encyclopedia of Philosophy, *Equality*, 2007, retrieved 8 December 2012,
<<http://plato.stanford.edu/entries/equality/>>

World Bank Data Base, retrieved 2 December 2011 <<http://data.worldbank.org/>>