

The Equal Society

Essays on Equality in Theory and Practice



Smile

edited by **GEORGE HULL**

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Chapter 9

An African Egalitarianism

Bringing Community to Bear on Equality

Thaddeus Metz

1. INTRODUCTION: GROUNDING EGALITARIANISM ON AFRICAN TERRITORY

What might egalitarianism look like if it were derived not from a familiar moral principle such as utilitarianism or Kantianism, but rather one informed by another, sub-Saharan African tradition? Would it prescribe the same kinds of approaches to economic justice at the national level and for the same reasons?

Discovering convergence among the implications of Anglo-American and sub-Saharan moral-theoretic foundations would be interesting. However, even more so would be encountering divergence between them, which would then call for a consideration of which moral foundation is more philosophically attractive.

In this chapter, I consider what communitarian ethical perspectives salient among indigenous black peoples below the Sahara plausibly entail for distributive justice within a state, and I argue that they support a form of egalitarianism that differs in several important ways from varieties common in contemporary Anglo-American political philosophy. In particular, the sort of egalitarianism I spell out rivals not only luck-oriented variants from the likes of Ronald Dworkin, G. A. Cohen and theorists inspired by them such as Richard Arneson, Carl Knight and Nir Eyal, but also more ‘social’ kinds advocated by Elizabeth Anderson, Samuel Scheffler and Jonathan Wolff. Although I do not argue that these broadly Kantian egalitarianisms are less plausible than the Afro-communitarian version, I do aim to establish that it should be taken as seriously as they, at this stage of the debate.

Libertarianism is alien to the African tradition, with many leading political philosophers from it instead having maintained that sub-Saharan

communitarian values tend to support some kind of economic egalitarianism.¹ However, these thinkers, which include Julius Nyerere, Kwame Nkrumah, Henry Odera Oruka and Segun Gbadegesin, have articulated views different from what I advance here, in at least three ways. First, they have not supported the specific, moderate form of egalitarianism that I believe is best justified by characteristically African values; second, they have not been as systematic as I intend to be about precisely how egalitarianism follows from them; and, third, they have not compared African egalitarianism with Anglo-American, and especially Kantian, versions so as to facilitate comparison with, and debate between, major philosophical traditions.²

Note that I aim to argue neither that egalitarianism is justified, nor that the Afro-communitarian moral foundation I appeal to warrants belief. Instead, my primary goals are to determine what the latter entails with regard to the former, and to make the case that the African egalitarianism I put forth is a serious competitor to kinds that are more familiar to an English-speaking readership. Sometimes the sorts of distribution of education, jobs and wealth that Afro-communitarianism recommends differ, while other times its fundamental explanations for them do.

In the next section, I start by spelling out key elements of one major swathe of sub-Saharan thought about morality, which takes certain ideals of community, and not utility or autonomy as these are standardly understood, to be fundamental. In the following sections, I explain why the African ethic entails a kind of economic egalitarianism as a way to honour communal values, and then how it also plausibly limits the extent of egalitarian tendencies in light of a certain conception of communal relationships. I conclude the chapter by considering how an Afro-communitarian ethic might additionally inform economic justice in future work, for instance, when it comes to which things may rightly be commodified or how contracts should be enforced.

2. AN AFRO-COMMUNITARIAN ETHIC³

As I am most familiar with southern African worldviews, I concentrate on them when spelling out a sub-Saharan ethic. However, most scholars of the sub-Saharan region maintain that, while there is substantial diversity among its black indigenous cultures, there are also threads that many share. So, while I discuss an (not 'the') African theory of morality, I am confident that many, if not most, peoples below the Sahara would find it familiar and attractive.

In spelling out a basic normative principle with a sub-Saharan pedigree, I am not seeking to accurately *reflect* the way that southern African peoples have understood ethics. Instead, I draw on the way that a variety of them

and thinkers informed by them have understood ethics, in order to *construct* a plausible moral-philosophical theory, one that both is distinct from utilitarianism, Kantianism and other dominant Western views and can be used to judge contemporary controversies, including how to understand equality as a facet of economic justice.

The maxim that southern African peoples, and Africans more generally, often invoke to sum up salient ethical perspectives is ‘A person is a person through other persons’ (e.g., Tutu 1999: 35; Dandala 2009: 260).⁴ Although those familiar with sub-Saharan cultures associate certain ideas with this phrase, in plain English it can mean virtually nothing to someone outside the fold (after all, one might ask, whoever thought that a person is not a person?). Since this chapter is pitched to an English-speaking audience that transcends those who know Africa, and since transparency and clarity are essential for the purposes of public morality, in this section I articulate an ethic based on this maxim the meaning of which can be grasped, and even appreciated, by those from a variety of backgrounds.

What, then, does it mean to say that a person is a person through other persons? Or, rather, which interpretation of this phrase is both continuous with sub-Saharan ethical traditions, particularly those in southern Africa, and *prima facie* attractive as a basic moral principle?

2.1. ‘A Person Is a Person’

Take the first clause. When sub-Saharans say that ‘a person is a person’ they are not expressing a tautology. Instead, what they mean includes the idea that someone who is a person, in the sense of a deliberative agent such as a normal human being, ought to strive to become a *real* or *genuine* person, that is, someone who exhibits moral virtue (Ramose 1999: 52–53; Menkiti 2004).⁵ A person with excellence has what is famously called ‘*ubuntu*’, literally humanness in the Nguni languages of Zulu, Xhosa and Ndebele in southern Africa. A true or complete person is someone who lives a genuinely human way of life, who displays ethical traits that human beings are in a position to exhibit in a way that nothing else in the animal, vegetable or mineral kingdoms can.

Just as one might say that a jalopy is ‘not a *real* car’ (Gaie 2007: 33), so Africans often say of those who lack *ubuntu* that they ‘are not a person’ (Gaie 2007: 32; Dandala 2009: 260–261) or, in cases of truly wicked behaviour, that they are ‘animals’ (Pearce 1990: 147; Bhengu 1996: 27; Letseka 2000: 186). That does not mean that evil doers are literally not human beings, viz., no longer subjects of human rights, but instead connotes the metaphorical point that these individuals have utterly failed to exhibit human (moral) excellence and have instead actualized their lower, base nature (Ramose 1999: 53; Gyekye 2010).

2.2. 'Through Other Persons'

Turning now to the second clause, it tells people how to become real persons or to exhibit *ubuntu*, namely, 'through other persons'. This roughly means by prizing *community*, or sometimes *harmony*, with others. It is well known that African ethics is characteristically communitarian, but this element is often left vague or is construed in a crude and unattractive manner, say, as the group taking precedence over the individual, so that the latter may be used merely as a means for the former. As should become clear below, a sub-Saharan moral principle can really be put to work, and be appealing for giving due weight to individual liberty, once one is clear about what it means to live communally or to honour harmonious relationships. To spell out what such plausibly involves, I start from representative comments from southern Africans about it.

Former South African Constitutional Court Justice Yvonne Mokgoro remarks of an *ubuntu* ethic, 'Harmony is achieved through close and sympathetic social relations within the group' (1998: 17). Nhlanhla Mkhize, an academic psychologist at the University of KwaZulu-Natal who has applied *ubuntu* to conceptions of the self, remarks, 'A sense of community exists if people are mutually responsive to one another's needs. ... (O)ne attains the complements associated with full or mature selfhood through participation in a community of similarly constituted selves. ... To be is to belong and to participate ...' (2008: 39, 40). For a final example, Mluleki Mnyaka and Mokgethi Motlhabi, two theologians based in South Africa, say this of *ubuntu*: 'Individuals consider themselves integral parts of the whole community. A person is socialised to think of himself, or herself, as inextricably bound to others. ... Ubuntu ethics can be termed anti-egoistic as it discourages people from seeking their own good without regard for, or to the detriment of, others' (2009: 69, 71–72).

And for some examples beyond South Africa, the most influential African political theorist, the Ghanaian Kwame Gyekye notes, 'The fundamental meaning of community is the sharing of an overall way of life, inspired by the notion of the common good' (2004: 16), while the Nigerian philosopher Segun Gbadegesin says of a representative African moral perspective, 'Every member is expected to consider him/herself an integral part of the whole and to play an appropriate role towards achieving the good of all' (1991: 65).

These and additional construals from many other parts of Africa about what it is to commune or to live harmoniously with others suggest two recurrent themes (initially analyzed in Metz 2007, 2011). On the one hand, there is what I call 'identity', a matter of being close, belonging and participating, thinking of oneself as bound up with others, sharing a way

of life, and considering oneself part of the whole. On the other hand, one finds reference to being sympathetic, responding to others' needs, acting for others' well-being, and promoting the common good, which I label 'solidarity'.

More carefully, it is revealing to understand identifying with another (or being close, belonging, etc.) to be the combination of exhibiting certain psychological attitudes of 'we-ness' and cooperative behaviour. The psychological attitudes include a tendency to think of oneself as a member of a group, to refer to oneself as a 'we' (and not so much an 'I'), a disposition to feel pride or shame in what the other or one's group does, and, at a higher level of intensity, an emotional appreciation of the other's nature and value. The cooperative behaviours include being transparent about the terms of interaction, allowing others to make voluntary choices, acting on the basis of trust, adopting common goals, and, at the extreme end, choosing for the reason that 'this is who we are'.⁶

Exhibiting solidarity with another (or acting for others' good, etc.) is similarly aptly construed as the combination of exhibiting certain psychological attitudes and engaging in helpful behaviour. Here, the attitudes are ones positively oriented towards the other's well-being and characteristically include a belief that the other merits aid for her own sake, an empathetic awareness of the other's condition, and a sympathetic emotional reaction to this awareness. And the actions are not merely those likely to be beneficial, that is, to improve the other's state, but also are ones done consequent to certain motives, say, for the sake of making the other better off or even a better person.

These specifications of what it is to commune, *qua* relationships of identity and solidarity, can ground a fairly rich, attractive and useable African ethic, at least upon bringing in one more concept: human dignity. The idea that human beings have a superlative non-instrumental value that makes them special relative to the mineral, vegetable and animal kingdoms is also salient in the sub-Saharan tradition (e.g., Nkrumah 1970: 68; OAU 1981; Wiredu 1996: 157–171; Ramose 1999: 49–64, 138–145, 163–195; Deng 2004).

My suggestion is to consider us to have a dignity in virtue of our natural capacity for community, as above. Most common are the ideas that a person's dignity inheres in her ability to govern herself rationally, as per the Kantian tradition, or in the fact of her being alive, à la Catholicism and some of the African tradition (e.g., Magesa 1997; Iroegbu 2005). In contrast, the present idea is that we have a dignity, or the highest moral status, because of our social nature, our various capacities for other-regard that make up communal relationships. As I indicate in the next sub-section, this is more or less a matter of saying that we have a dignity in virtue of our capacity to love and be loved.

2.3. An African Moral Theory

Bringing things together, here are some concrete, principled interpretations of ‘a person is a person through other persons’, which are meant to be more or less equivalent:

- One should become a real person, which is matter of respecting persons who have a dignity because they are naturally capable of entering into relationships of identity and solidarity;
- An agent ought to live a genuinely human way of life (exhibit *ubuntu*), which she can do if and only if she honours people in virtue of their essential capacity to share a way of life with others and care for their quality of life;
- Right actions are those that treat people as special in virtue of their basic ability to enjoy a sense of togetherness, to participate in cooperative projects, to engage in mutual aid, and to do so consequent to sympathy and for others’ sake.

One way to begin to appreciate the explanatory power of such a principle when it comes to morality is its implication for the nature of wrongdoing. Since the relationship of identifying, or sharing a way of life, with other people in combination with that of exhibiting solidarity with, or caring for, others is basically what English-speakers mean by ‘friendliness’ or a broad sense of ‘love’, this moral-theoretic interpretation of typical sub-Saharan values implies that wrong actions are, roughly, those that are not friendly.⁷ What makes acts such as killing, raping, deceiving, exploiting, breaking promises and the like typically impermissible is that they fail to respond positively to what gives people a dignity, namely, their capacity to befriend and to be befriended. In fact, these acts are well construed as being (extremely) unfriendly or unloving, ways of prizing division and ill-will, the discordant opposites of identity and solidarity. Such analysis fleshes out the suggestive comments of Desmond Tutu, renowned former chair of South Africa’s Truth and Reconciliation Commission, when he says of Africans,

We say, ‘a person is a person through other people’. It is not ‘I think therefore I am’. It says rather: ‘I am human because I belong’. I participate, I share. ... Harmony, friendliness, community are great goods. Social harmony is for us the *summum bonum* – the greatest good. Anything that subverts or undermines this sought-after good is to be avoided like the plague. (1999: 35)

One way to clarify and motivate this Afro-communitarian ethic at this point would be to compare and contrast it with more familiar principles, such as those of utility and respect for autonomy. However, instead of doing

that, I now apply the ethic to considerations of economic justice, and work to highlight respects in which its egalitarian implications differ from, and are often appealing relative to, influential versions in English-speaking philosophy, especially those informed by Kantianism.

3. ACCOUNTING FOR EGALITARIANISM

An egalitarian state is one that treats at least its citizens, if not its residents more generally, as equals. However, by that vague definition, even a libertarian state could count, which political philosophers do not normally understand to be compatible with egalitarianism. I therefore need to specify the kinds of equal treatment that I seek to derive from the previous section's Afro-communitarian ethic.

By 'equal treatment' I set aside issues such as equality before the law, equal rights to civil liberties, and the equal ability to participate in political governance. Although I think Afro-communitarianism supports these forms of equality,⁸ my concerns in this article are strictly economic. In this section I argue that Afro-communitarianism grounds strong *pro tanto* justification for two sorts of economic equality, roughly, equal chances at positions such as education and jobs, on the one hand, and at possessions such as money, personal property and services, on the other.⁹ In the following section, I argue that the kind of equality that is conclusively justified is not an extreme form, and that the African moral theory in fact is best understood as requiring only comparable, and not literally equal, opportunities and benefits.

3.1. Equal Chances at Positions: Education

When sub-Saharan thinkers have addressed economic justice, they have invariably focused on the distribution of possessions, and have not taken up that of positions in any depth. When it comes to equality of opportunity, the Afro-communitarian ethic from the previous section prescribes a broadly familiar sort. However, it does so for reasons that interestingly differ from the norm in Anglo-American political philosophy.

With regard to a person's ability to acquire an education, nearly all egalitarians believe that it must not be largely determined by the neighbourhood into which she was born, the amount of wealth her parents hold, or the culture into which she has been reared. Instead, most maintain that the extent of one's education, particularly at university level, ought to be a function of one's endowment and determination, roughly, a matter of how much one can naturally do and how much one is willing to put such talents to work in order to learn. Practically, most egalitarians believe that ensuring such a principle

is realized requires the state to tax the wealthy so as to fund public education, from pre-primary to tertiary levels, as well as job training programmes.

Most often, egalitarians, particularly those drawn towards luck variants, hold the principle of equal opportunity with respect to education because they see it as a ticket to getting a job, which, in turn, is a means to obtain wealth. That is, equal access to education is usually valued morally insofar as it is a reliable means to an individual's ability to earn money and other possessions.

While that is plausibly some of the rationale for allocating education according to talent and effort, it is probably not all of it. Imagine a society in which few, if any, of the jobs require a university degree. Perhaps its economy is strictly oriented towards agriculture and tourism, for example. Suppose, though, that this society has a first-rate university. In that case, a requirement to allocate entry into university based on qualifications cannot be justified by its serving as a means to obtain a job and hence wealth. There has to be some additional rationale for such an allocation.

Note that some salient instances of non-luck or social egalitarianism also do a poor job of accounting for equal opportunity to obtain an education as a requirement of justice. For Elizabeth Anderson, at least on the most well defined interpretation of her view, the state must mete out whatever is essential for individuals to function as equal citizens in a democratic state and in civil society (1999: 316–322), while Samuel Scheffler remarks that regarding egalitarianism as 'a political ideal, it highlights the claims that citizens are entitled to make on one another by virtue of their status as citizens, without any need for a moralized accounting of the details of their particular circumstances' (2003: 22). However, higher education, at the very least, is not something for the state to allocate merely as a means to enabling people to act as citizens, a point similar to one that Jonathan Wolff has made against Anderson with regard to goods such as housing (2010: 349). Consider, too, that there would plausibly be a right to an equal chance at higher education even if one were living in a totalitarian regime that had no chance of changing in the medium term. If so, then this economically egalitarian right cannot merely be a function of enabling participation in a politically and civilly egalitarian system.

There are admittedly some other approaches by social egalitarians that are more promising. For instance, Scheffler also remarks, 'Even if basic needs have been met, a society cannot be considered a society of equals if the resources that individuals have available to pursue their most cherished ends is left entirely at the mercy of market forces' (2003: 23; cf. Anderson 1999: 315). It is plausible to think that redistributive taxation for the sake of enabling those born into lower economic classes to attend university is essential for the rich and the state not to treat the poor as inferiors.

While this is an attractive line, the African moral theory provides some additional, fresh argumentation that also merits consideration. The latter focuses not solely on education as something an individual may justly claim from the state or the wealthy *for his own sake*, but also on how an individual has a right to education *as a means by which to discharge his obligations to others*. By the principle that the state must treat people as special in virtue of their capacity for harmonious relationships of sharing a way of life and caring for others' quality of life, the state must itself build and maintain a caring relationship with its citizens. That, in turn, means doing not only what is likely to make people better off, or to satisfy their self-interest, but also what is likely to make them better people, to foster their self-realization as moral beings (their *ubuntu*). Consider both facets in turn.

When it comes to making people better off, it is reasonable to think that education is an objective good, something that partly constitutes an improvement in one's quality of life, perhaps by making it more meaningful. Although education is often useful as a means, it is reasonable to think that it is also valuable in itself, apart from how it is used. After all, when people admire those who are educated, it is usually not in virtue of what they can do with it, but rather for having acquired it, period.

Of course, the state should not be in the business of distributing literally everything that improves lives, such as chocolate. However, a just state arguably ought to serve the function of distributing resources that are particularly able to improve people's lives, where that includes not merely education, but also museums, outdoor artworks, libraries, healthcare, couples counselling, parks and natural beauty.¹⁰

What difference is there between the present rationale for equal access to education and a utilitarian theory paired with an objective conception of the good? For one, whereas a utilitarian state would maximize the net sum of objective goodness, a state that seeks to sustain a caring relationship with *each of its dignified citizens* may well not. This point also serves to explain why sexist or otherwise discriminatory educational roles would be unjust; there is no reason to think that what is good for an individual with regard to education is fundamentally a function of her biological sex or gendered persona. For another, note that a utilitarian state has no principled reason to give more attention to its citizens than to foreigners to whom it could provide still more gains in education. In contrast, a state that must honour people in virtue of their capacity for relationships must in the first instance give priority to each of *its* people, those to whom it is already communally related.

Attending to people's well-being does not exhaust the rationale for providing equal opportunity to education by the African moral theory; recall that the state must also provide resources that would enable its citizens to become excellent as human or moral beings. Respecting a friendly relationship means

not just making one's friend happier, but also enabling her to be a good friend. Such a rationale also helps to justify a principle of basing education on talent and effort, in that doing so would enable citizens to help other citizens. The better endowed and more willing to work one is, and then the more education one receives on that basis, the more one is in a position to care for others and thereby exemplify humanness. Hence, the state must base education on qualifications in part because doing so is necessary to enable citizens to help improve others' quality of life, an unusual but compelling argument with a sub-Saharan pedigree. One has a right to what is necessary to do good.¹¹

3.2. Equal Chances at Positions: Jobs

Normally, the rationale for allocating jobs according to qualifications is that wealth is tied to work and that one ought to have an equal chance at acquiring differential amounts of wealth. This approach is implicit in a large majority of contemporary discussion under the headings of 'luck egalitarianism', 'equal opportunity for welfare' and the like. And it is explicit not only in a proponent such as Rawls, insofar he maintains that wealth, potentially unequally distributed, is to be 'attached to jobs and offices open to all' (1999: 53, 266), but also in critics of the idea of 'the equal right to become unequal', where it is assumed that with a job comes a certain degree of financial and related rewards (e.g., Schaar 1967).

However, the idea that one's chances at a job should be a function of one's endowment, determination and education is not fully, or even particularly well, justified by the ideal of having a reasonable chance to access the stratified benefits that jobs might bring in their wake. For one, imagine a world in which wealth were not tied to work. Suppose that money and similar resources were distributed among the able-bodied comparably, regardless of which jobs they had, so long as they worked to a sufficient degree at them. Or consider the communist ideal of distribution according to need. Even in these scenarios, it would be distributively just to allocate jobs according to qualifications, and unjust not to do so.¹²

Utilitarians have a reasonable explanation of why jobs (and also education) should track qualifications, setting aside the issue of the consequent reward, but so does the Afro-communitarian. As with education, having a job can both be objectively good for the person who has it, as well as enable a person to do good. Consider both.

First, those who excel at a job are exercising their talents (Nagel 1973: 356, 359; Galston 1986; Gbadegesin 1991: 232, 241), which might count as good in itself for them, again perhaps for being sources of meaning in life. In addition, they probably feel greater self-esteem consequent to that,¹³ which

is plausibly part of a flourishing life beyond whatever element of subjective well-being it contains.

Second, and of particular relevance to an ethic prizing self-realization via communal or harmonious relationships, those who excel at the right sort of job, viz., one that is not destructive, are exhibiting human excellence for contributing to society. If the state must treat people as having a dignity in virtue of (in part) their capacities to be cared for and to care for others, then it must care for each of them by apportioning jobs in accordance with their particular abilities and inclinations to care for others. This is clearly what Augustine Shutte intends, in one of the first books devoted to southern African moral and political ideals, when he remarks,

In an ethic of *ubuntu* ownership and property ... only get their meaning and purpose from their relation to work as a means to personal growth and community. ... They are justified insofar as they enable productive work for the common good, unjustified insofar as they prevent it. (2001: 159)

Similarly, Bénézet Bujo, a Congolese theologian who has published two important books on sub-Saharan ethics, notes, ‘It is a well-known fact that in traditional Africa, work had nothing to do with “salary.” The development of the clan’s community life is what was emphasized’ (1997: 164).

In sum, a state that must exhibit solidarity with each of its dignified citizens has welfarist and, especially, virtue-based reasons for ensuring that jobs go to those who are qualified for them (and, of course, have sought them out¹⁴). Before turning to the allocation of possessions, as opposed to positions, I note how the present rationale for equality of opportunity with regard to the latter helps to avoid one of the puzzles facing debates about luck and related forms of egalitarianism. The puzzle is about the extent to which one is responsible for one’s ability to make an effort. Some hold that one is and is hence properly given a job or an education, and others maintain that one is not, making it an irrelevant or at least weakened basis. Much of this debate accepts a principle of desert (e.g., Sher 1987; Knight 2011) or of minimizing the extent to which luck, arbitrariness or factors that are not one’s fault affect one’s life, or at least one’s wealth (e.g., Arneson 1989; Cohen 1989; Eyal 2007; see, too, a former self, Metz 2000).

The present justification of equal opportunity to acquire positions enables one to side-step much of this debate, as the former is largely forward-looking and the latter is not. According to the Afro-communitarian rationale, a large part of the point of allocating education and jobs is to foster people’s self-realization as communal beings, which means that issues about choices made in the past play no fundamental role. One reason to take the African justification for equal opportunity seriously is that it avoids a backward-looking

premise shared by opponents party to a long-standing debate that some might reasonably deem irresolvable.

3.3. Equal Chances at Possessions

Virtually no egalitarian these days believes in strict equality of outcomes or condition, regardless of the choices people have made. A decision by an able-bodied person not to work, or a mentally competent adult to gamble money away, or a well intentioned person to give money away to a civic organization, or (more controversially) a well informed consumer not to purchase enough insurance are the kinds of choices that nearly all political philosophers in the English-speaking world take to be relevant in some way or other to a just allocation of wealth. Some kind of equal ability to acquire wealth is what matters, not an equal holding of wealth *simpliciter*.

Aside from the first point about wealth being contingent upon work (Nyerere 1962, 1967: pts. 2 and 3; Gbadegesin 1991: 226, 241; Bujo 1997: 162–164), African theorists of economic justice have not addressed such matters in any depth. Since the works of post-independence leaders such as Julius Nyerere (1962) and Kwame Nkrumah (1967, 1970), talk of ‘equality’ and ‘egalitarianism’ abound in the field of sub-Saharan political philosophy without much careful qualification. Fairly typical are the following remarks from Henry Odera Oruka, who is probably Kenya’s most influential philosopher:

Part of the aim of egalitarian fairness is to suppress and eradicate, as a matter of cardinal ethical principle, any development toward inequality in wealth and liberty. Equality in egalitarian terms is an end in itself and inequality an evil to be eliminated, even at a high price. (1997: 120)

Although Oruka is a thoughtful philosopher, these remarks seem not to be. Surely, they are too crude to ground a just conception of how to distribute possessions; decisions about whether to acquire and how to spend wealth matter.

Upon reflection, however, I find some wisdom in the focus of Oruka and other African thinkers who have made similar kinds of comments. One can fairly read them not as implying that individual choices are irrelevant to the allocation of wealth, but rather as maintaining, implicitly *contra* luck egalitarianism, that they are not the whole story about it. I suspect the dominant African view has been that, regardless of which decisions people make, if the overall consequence were a substantial degree of inequality, that result would be unjust.

Why think that is true? The recurrent theme in the sub-Saharan tradition has been that great inequality would ‘ensure serious disharmony, envy and

distrust in the society. Yet a just society, in communitarian terms, must be free of such problems' (Oruka 1997: 120), and, again, that an ideally African way of life 'assures the least economic inequality' because 'disharmony must be constantly guarded against, whether it comes from social or economic inequalities' (Magesa 1997: 278).

What I do now is spell out precisely how great inequality of possessions would be likely to prevent harmonious or communal relationships, understood in the previous section as to be valued for their own sake as a way to show respect for people's dignity. Recall that such an ideal form of relating has two distinguishable aspects, identity and solidarity, each of which also has two dimensions, one primarily psychological and the other mainly behavioural. On all four counts, I now argue, substantial inequality of wealth would be a threat to communal relationships, so that a state that permitted it would fail to honour people in virtue of their capacity for them.

First off, it is difficult for people to experience a sense of togetherness, one part of identifying with others or sharing a way of life with them, when there is substantial economic stratification. Sociologists have known for a long while that people are inclined to develop romantic and friendly relationships among those from the same socio-economic bracket, and, furthermore, that socio-economic inequality, and not poverty as such, is what best explains social unrest such as violent strikes, that is, actions consequent to divisive 'me versus you' attitudes. The fact that great economic inequality makes it hard for people to enjoy a common sense of self, and to avoid feelings of envy, distrust and anxiety (cf. Wilkinson and Pickett 2009), is a strike against it, from an Afro-communitarian standpoint.¹⁵

Second, recall the other major dimension of sharing a way of life, namely, participating with others on a cooperative basis. This, too, is threatened by great economic inequality, for, as is widely accepted by egalitarians in both the Western and African traditions, with great wealth usually comes great power and the ability to subordinate others. Sometimes this is in the form of having a disproportionately large share of influence over the political process, which undermines democratic decision-making (e.g., Ramose 2010). Other times, it is in the form of being able to harness people's labour-power so that they have little choice but to work on one's farm or in one's mine in exchange for funds necessary to meet needs, thereby permitting the rich not to work at all (Nyerere 1962; Nkrumah 1967).

Third, consider now a relationship of solidarity, which includes actions that are likely to make other people's lives go better. Recent research has been widely taken to support what egalitarians have often deemed to be obvious, viz., that inequality often prevents people's lives from being improved (Stiglitz 2013; Piketty 2014). Were the rich to give more, or were the state to tax the rich at a higher rate and redistribute accordingly, these agents would

do more to help those who could most benefit from it. If the state must treat people as equal in virtue of their capacity for communal relationships, ones that include caring for others' quality of life, then a duty on the part of the state (and those with the requisite resources who could easily support it) follows easily. The state must work to develop people's capacity to commune with each other, which will involve providing them resources useful for such, and it must also itself enter into community with them, which will mean caring for their quality of life and again redistributing as necessary from rich to poor.

However, what about situations in which inequality would actually be to the benefit of the worst-off? It is important to see that the present argument against gross inequality applies even to the difference principle, according to which a certain degree of inequality of wealth would be just if and only if it were to give those with the least wealth more of it than they would have with less inequality (as many read Rawls 1999). Even if it were true that the worst-off would have somewhat less wealth with less inequality, there can be good reason to doubt that more inequality would be more just. Why?

For one, consider that by the Afro-communitarian ethic, part of what is to be valued is the *act of striving to (do what is likely to) benefit*, and not so much the *state of affairs in which another is benefited*. Suppose that if one were to focus on one's own interests, one could unintentionally benefit another person to degree X, perhaps because of invisible hand considerations. Suppose, too, that if one were instead to focus on achieving the good of the other person, one could benefit her to an $X - N$ degree, where $N > 0$. Utilitarians would of course favour the former act as morally preferable, but the Afro-communitarian is likely to favour the latter, so long as N were a marginal amount of benefit. This is one clear respect in which the *relationality* of the ethic does work.

What this thought experiment means for the difference principle is that, from the standpoint of the African moral theory, wealth is something relevant to justice not merely to the extent that it makes people's lives go better in individualist terms, but also insofar as it is *given*, that is, transferred to others in ways that express certain positive attitudes about them.¹⁶ Hence, if a somewhat more equal society had more helping relationships in it, that could be some moral reason to favour it over a more unequal society that were to the financial benefit of the worst-off.¹⁷

For a second way to see how considerations of solidarity could give one reason to question the difference principle, consider that inequality is thought by sociologists to foster property crimes and those attended by violence such as armed robbery. Even if people with the least money had somewhat more, the degree of inequality needed to produce that wealth could be such as to foster ill-will, the opposite of solidarity, in the form of other-regarding criminal

behaviour. And an interest in preventing that sort of crime could therefore give one moral reason to reject the difference principle.¹⁸

Finally, recall that another element of solidarity, or caring for others' quality of life, goes beyond behaviour that is likely to improve others' good to include certain psychological dispositions prompting such behaviour. In particular, to exhibit solidarity includes seeing others as meriting help for their own sake, and not merely for the sake of oneself or some impersonal state of affairs, as well as tending to be moved by sympathy. Work by psychologists indicates that those who acquire wealth are, upon having done so, on average less moved by the plight of others who are in pain or otherwise worse off than they.¹⁹ If that were true, then, again, there would be *pro tanto* reason for someone who values positive attitudes about others for their own sake to balk at huge gaps between the rich and the poor.

So far, I have argued that the four key elements of communal relationships would each be threatened by great inequalities in holdings. Here is another argumentative strategy by which to see how respecting people in virtue of their capacity for identity and solidarity plausibly rules out large inequalities of wealth. Consider the exemplar of relationships of identity and solidarity, the family, and how wealth is distributed in it in the ideal case. Intuitively, a family should distribute resources to its members in a *balanced* way. When allocating time, attention, money and whatever else is likely to improve others' lives, a head of household should distribute them so that everyone gets a comparable share, with the particularly talented and the particularly untalented each getting something greater than a strictly equal share.

Consider that if only one child were gifted, say, at piano, the bulk of resources should not go to her, although she probably should get more than an average child. On that point, note that a head of household would be wrong to parcel out resources in a strictly equal manner, not merely because the piano player should reasonably get more than that, but also because the particularly untalented child should reasonably get more. And yet a head of household would be wrong to devote the bulk of resources to the worst off child, particularly if he were handicapped, so that there would be nothing left for those able to flourish at a higher level.

These reflections suggest a kind of balancing, in which there is no great inequality between family members and all receive some substantial consideration, but those who need more resources either to reach a decent minimum of good or to approximate a maximum should receive a larger share. If that is indeed the proper distribution for a family, and if a society ought to be modelled on an ideal family—which is a natural perspective for someone who prizes Afro-communitarian values (e.g., Nyerere 1962; Oruka 1997: 148–150)—then resources ought also to be distributed in a balanced way within a state's territory.

In sum, working with a conception of dignity according to which it inheres in certain communal capacities, great inequality of possessions looks highly suspect. If what is special about people is their ability to share and care, then the right way to distribute holdings would be one likely to bring people together, which, in turn, amounts to balancing the allocation of goods so that everyone's interests are adequately secured and no one is favoured to such a high degree that division and ill-will are fostered. This is pretty much how a family distributes goods among its members in order to express love for each one, and should be given serious consideration as a model for economic justice at a national level.

Recent social forms of egalitarianism, discussed above, also emphasize the idea that a distribution of wealth should ultimately be a way of expressing respect for others or otherwise instantiating certain relationships. However, extant social forms of egalitarianism have so far been either too narrow, focusing on relationships between people as citizens (the tendency of Anderson and, to a lesser extent, Scheffler), or too broad, speaking of a need to 'overcome hierarchical divisions' (Wolff 2007: 135). One advantage of the present, Afro-communitarian theory in comparison to these views is that it is precise about what makes people entitled to respect, namely, their natural capacity for communal relationships, and is therefore able to ground fairly specific and plausible arguments about how to distribute education, jobs and wealth. Or so I hope the reader agrees about the argumentation in this section and the next.

4. LIMITING EGALITARIANISM

Towards the end of the previous section, it became clear that a rejection of great inequality on grounds of prizing people in virtue of their capacity for community is comparable with a rejection of strict equality, too. In this section, I make a stronger point, namely, that strict equality *must* invariably be rejected in order for the state to honour people for their ability to share a way of life and care for others' quality of life. The value of communal relationships explains not only why too much inequality would be morally objectionable, but also why too much equality would be. In this section I establish that point in the context of each of three major topics covered in the previous one: education, jobs and possessions.

When it comes to education, the default position for the state should be to allocate learning opportunities equally in the sense of according to ability as well as effort (at least at higher education levels). Basically, that is the way to treat each person with respect in virtue of her capacity to be part of relationships of identity and solidarity, where exhibiting solidarity requires a state

to help its citizens by making them better off and enabling them to become (morally) better people, both of which education does.

Now, some institutions offer education but restrict access to it on the basis of certain conditions unrelated to qualifications, such as religious affiliation. On the face of it, such a practice contravenes the state's requirement to ensure citizens are able to obtain education based on qualifications alone. However, it need not be viewed that way.

Even if literally all educational institutions in a state's territory were private and used religious criteria when determining access, the state *could* be said to have discharged its duty, so long as all pupils in the society were able to enter some schools that are nearby, of suitable quality and the like. If all Jewish children were able to find a good, local Jewish educational institution, and if all Christian children were able to do the same, and so on, then the state's duty to ensure equal access to education would be satisfied.

In some ways, that arrangement would be ideal. Respecting people's capacity for community in part means respecting the ways they have actualized that capacity. Allowing private educational institutions to filter access based on religious or similar criteria would enable existing *communities*, by which I mean groups who have exemplified identity and solidarity to a substantial degree, to sustain and enrich still more their communal relationships.

Of course, in practice such an ideal state of affairs is unlikely to obtain. And so, in the real world, the state may allow private educational institutions to use factors other than qualifications for admission, subject to it being able to provide enough quality public education to ensure that all students have comparable access in accordance with their qualifications. Supposing that were feasible on the part of the state, it would strike the right balance between making allowance for actual communities, on the one hand, and ensuring that the state exhibits the communal relationship of solidarity with young people by providing adequate access to good education, on the other.

A similar kind of point applies to equal access to jobs. Although in the previous section I argued that there is strong *pro tanto* reason for the state to allocate job opportunities equally in the sense of according to qualifications, unlike some forms of egalitarianism, the one grounded on Afro-communitarian values does not dismiss the interest of small business owners in determining with whom they will interact closely and routinely. The state should not force a tiny mom and pop store to hire solely according to qualifications; mom and pop may instead use other criteria to determine whom they will hire, so that their interest in sustaining or developing communal relationships is given consideration.

However, those working in large firms have much less of such an interest, given the unavoidably greater distance and formality between workers, managers, owners, etc. In addition, since large firms have significant resources,

and since their hiring practices could systematically influence the well-being of others in society, they have a duty to share their jobs with those who are capable of doing them, or at least the state does no wrong in making them do so.

In sum, then, supposing there were enough jobs available to applicants beyond those at small, family-owned and -run businesses, the state should allow the latter to be exempt from hiring based on qualifications alone. That would also strike the right balance between making allowance for actual communities, on the one hand, and ensuring that the state exhibits the communal relationship of solidarity with people by enforcing roughly equal access to jobs, on the other.

Before turning to possessions, I note one more respect in which communitarian values preclude strict equality of opportunity. As James Fishkin (1983) was the first to point out systematically, a state that rigorously enforced equal opportunity would likely interfere with the family to an intuitively objectionable degree. After all, socialization in the family substantially and differentially affects people's ability to compete for education and jobs, such that strict equality of opportunity could well require the state to equalize those influences.

What the friend of the African moral theory can say is that the basic value of community *qua* identity and solidarity accounts well for the tension. On the one hand, prizing the communal relationship of solidarity means the state must enable people to become qualified for, say, jobs, while prizing actual communal relationships, viz., in the family, means that the state should not interfere with them too much. Since the family is the most intense expression of communal relationship, the state should by and large let it be (except to prevent and to make up for discordant behaviour such as abuse), and should hence seek to promote a rough, rather than strict, equality of opportunity.

Finally, when it comes to equal access to possessions, rather than positions, the state would also fail to express respect for people's capacity to commune if it enforced too rigid a distribution. An implication of the Afro-communitarian approach of balancing the distribution of goods is that too much equality, at least of certain goods, could be undesirable and downright immoral for precluding communal relationships. The latter of course require sharing wealth, that is, giving gifts, which practice unavoidably upsets a strict egalitarian distribution, as libertarians have fairly pointed out. One need not appeal to an individualist perspective such as Lockean natural rights or Kantian respect for autonomy in order to explain why gift giving should be permitted; for allowing people to commune with each other means permitting them to give their own resources away and to people with whom they identify, such as family members, friends and civic organizations, thereby

entailing that any egalitarianism must be loose. A state that continually taxed people so as to maintain strict equality of condition would objectionably interfere with people's ability to maintain and create relationships of identity and solidarity. That, too, is a plausible explanation of why the distribution of wealth must be merely comparable, and not strictly equal.

5. CONCLUSION: FURTHER ISSUES REGARDING ECONOMIC JUSTICE

In this chapter, I have spelled out a *prima facie* attractive moral theory grounded on communitarian values salient in the sub-Saharan tradition and drawn out some of its egalitarian implications for economic justice. Specifically, I have advanced the principle that right acts are those that treat people as dignified in virtue of their capacity for relationships of identity and solidarity, and have applied it to the distribution of positions and possessions. I have worked to explain more thoroughly than others who have favoured some kind of Afro-communitarianism precisely why this perspective grounds egalitarianism and which kinds. I have also worked to indicate how the African egalitarianism differs from more familiar sorts such as Kantian luck and social variants, and how it merits consideration from the field.

There are a number of issues related to economic justice that I have not addressed here, but that would be worth addressing, so as to obtain an even larger picture of the implications of the sub-Saharan moral theory. I have argued that it entails a kind of egalitarianism, one with limits with regard to strictness and one justified by largely forward-looking (but non-utilitarian) reasons regarding how to facilitate communal relationships between the state and each of its citizens and between citizens themselves. However, I have not addressed in depth, first, the issue of precisely what a state should regulate *when it comes to possessions*. While I think it is clear that it would allocate *whichever resources are likely to improve people's quality of life*, particularly when it comes to their ability to relate to one another in a sharing and caring way, that is extremely abstract and calls for analysis in relation to Rawlsian primary goods, Dworkinian resources and Nussbaumian capabilities. Second, it would be worth addressing how the African moral theory deals with the limits of commodification, such as sales of organs, votes and sex. And, third, it would be revealing to determine what Afro-communitarianism entails for the enforcement of contracts and unassumed obligations to aid others.

As indicated at the start of this chapter, it would be of most interest to discover that an African moral theory defends kinds of egalitarianism that differ from mainstream sorts in the Anglo-American tradition or provides

different rationales for them. I have sought to argue that this is indeed the case. Supposing the reader has found Afro-communitarianism's implications to merit consideration, it follows that she ought to begin to take sub-Saharan moral perspectives more seriously than is normally done in the international literature on egalitarianism and economic justice more generally.²⁰

NOTES

1. For an overview of post-colonial African political philosophy, including as it concerns the allocation of economic goods, see Metz (2015a).

2. In addition, while others have contended that African morality entails some kind of egalitarian, or at least redistributive, approach to justice, they have taken the value of community to be derivative of a basic one such as vitality (Magesa 1997) or utility (Gyekye 1997, 2004). In contrast, I focus on the branch of sub-Saharan thinking according to which communal relationships have non-instrumental moral importance.

3. Core elements of this section are drawn from Metz (2011, 2012, 2015b).

4. Or sometimes 'I am because we are'.

5. I focus on the ethical dimensions of the phrase, while others instead highlight some metaphysical ones, which I do not consider essential for a philosophically defensible moral theory.

6. The prescription to identify with others is one element that differentiates African ethics from the ethic of care (Noddings 1984) and some neo-Marxist definitions of 'community' in terms of mutual care (e.g., Cohen 2009: 34–35). For a thorough differentiation between these two moral philosophies, see Metz (2013).

7. At least in response to those who have not themselves been comparably unfriendly.

8. On which see Metz (2011, 2012).

9. Unlike much egalitarian literature (for example, Arneson 1993), I believe it is important to differentiate arguments with respect to education, jobs and wealth. I find it on the face of it implausible to think they should all be lumped together under the heading of 'economic benefits' that are to be allocated on the same basis.

10. Recall that it is notoriously difficult for those in the Kantian liberal tradition to justify state provision of everything on this list.

11. In more recent work Anderson (2007) has approximated something like this argument, contending that the point of higher education should be to enable people to contribute to the lot of the worst-off. However, her perspective remains focused on citizenship, which is restrictive (and overly so, chances are), in comparison with the Afro-communitarian principle that would have people also do what would improve the lives of their families, colleagues and broader societies.

12. For a related point, that one can have a moral claim to a job but not to the rewards offered with it, see Nagel (1973: 353–356); Galston (1986: 177); Daniels (1991: 160–161).

13. Judith Jarvis Thomson argues that it is these facets of a job that make it, rather than merely money, suitable for compensatory justice to victims of discrimination (1973: 383). My point is that, for the Afro-communitarian, and plausibly, such factors are relevant to distributive justice, too.

14. If the state were, à la the former Soviet Union, to force people to take jobs for which they were qualified, then it would treat people's capacity to share a way of life disrespectfully.

15. Similar points have on occasion been made in the Anglo-American tradition, viz., to the effect that inequality could objectionably reduce 'feelings of mutual identification' (Crocker 1977: 263) or obstruct the development of a 'core of shared attitudes and values' (Baker 1987: 35).

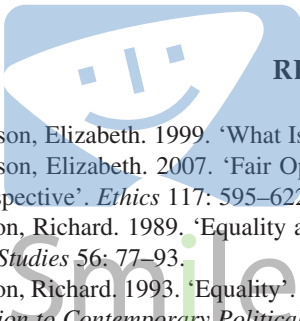
16. Anderson makes a similar point (1999: 313–314), but does not believe it tells against the difference principle, because of her appeal to Kantian, rather than Afro-communitarian, respect as a foundational ethic.

17. Kai Nielsen (1985) also criticizes the difference principle as a basis for allocating wealth on the ground that it neglects the way inequality could affect a non-financial consideration, specifically, the primary good of self-respect. However, Rawls himself includes the bases of self-respect among those primary goods to be regulated by the difference principle (1999: 266), and so perhaps the best way to read Nielsen's point is that Rawlsians and theorists of economic justice tend to forget that. In any event, noting that self-respect, an individualist good, could be impaired by inequalities of wealth differs from my point that relational goods of identity and solidarity could be so impaired.

18. It is hard to tell what Rawls would say about this case. If the lexical priority of the first, liberty principle means doing what it takes to prevent violations of liberties, then Rawls could conclude that inequalities in wealth are unjust if they prompt violence and theft.

19. For overviews of some of the studies, see Grewal (2012); Goleman (2013); Solman (2013).

20. I am very grateful to George Hull for thoughtful, constructive comments on a prior draft of this chapter.



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