Equity, Equality, and Need: What Determines Which Value Will Be Used as the Basis of Distributive Justice?

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The concept of justice is discussed, and the thesis is advanced that "equity" is only one of the many values which may underlie a given system of justice. Hypotheses about the conditions which determine which values will be employed as the basis of distributive justice in a group are proposed, with discussion centered about the values of "equity," "equality," and "need" and the conditions which lead a group to emphasize one rather than another value.

The research literature of social psychology which deals with justice has largely concentrated upon issues relating to equity (Walster, Berscheid, & Walster, 1973). This focus is a natural one in a society in which economic values tend to pervade all aspects of social life. Nevertheless, it is a limiting perspective since it is obvious that issues of justice may arise in noneconomic social relations (e.g., between parent and child) and may be decided in terms of values which are unrelated to input-output ratios. Only by casting noneconomic social relations in economic terms, and thus helping to contribute to the spread of economic values to all areas of social life, does equity theory hold forth the promise of being relevant to all social relations.

The Concept of Justice

Broadly viewed, the concept of distributive justice is concerned with the distribution of the conditions and goods which affect individual well-being. I use "well-being" broadly to include its psychological, physiological, economic, and social aspects. The
an injustice in the procedures by which the values, rules, or specific grades were determined. He may, for example, believe that the students rather than the teacher should select the principles and rules for assigning grades and should also make the assignment of grades. For him, the injustice lies in the methods by which the decisions are made rather than in the substance of the decisions.

There is much social psychological research which would suggest that this last-mentioned type of injustice is the most fundamental. The research to which I am referring indicates that people are more apt to accept decisions and their consequences if they have participated in making them. Although participation in the decisions which affect one’s well-being helps to legitimize such decisions, particularly in a society with democratic values, this is by no means the only source of legitimacy for the decision-making procedures involved in the distribution of benefits and harms. Legitimacy can also be derived from such factors as tradition, authority, or respect for the decision-maker’s expertise or power. However, whenever it is perceived that the decision-making procedures are themselves not legitimately based, then the values, rules, and specific practices in distributing rewards and costs will all come into question. Whether a student receives a high or low grade, it will be difficult for him to accept it if it is given by someone he considers to have no right to grade him.

Values Involved in Justice.

In scholarly discussions of the substantive values which underlie distributive justice, a number of key values have been repeatedly identified. Justice has been viewed as consisting in the treatment of all people:

1. so that all receive outcomes proportional to their inputs.
2. as equals.
3. according to their needs.
4. according to their ability.
5. according to their efforts.
6. according to their accomplishments.
7. so that they have equal opportunity to compete without external favoritism or discrimination.
8. according to the supply and demand of the market place.
9. according to the requirements of the common good.
10. so that none falls below a specified minimum.

It is evident that these different values may conflict with one another. The most needy may not be the most able, those who work the hardest may not accomplish the most, equal opportunity may not lead to equal reward, treating everyone as equals may not maximize the common good.

Among the many conflicting values for defining justice are there any that have a claim for an inherent or natural priority? Is there anything in the nature of man in society that connects justice to one rather than another set of values so that men will always react with a sense of injustice until the social order exemplifies these values of natural justice? Such questions as these have preoccupied scholars throughout history, and so far no completely satisfying answer has been given. I do not have one to offer either.

The Natural Values of Justice.

As a social psychologist concerned with both individuals and groups, let me suggest that there is usually a positive, circular relation between the well-being of the individuals in a group (or society) and the well-functioning of that group: The more satisfied the individuals are, the better their group functions, and vice versa. There are exceptions, of course, and my generalization is more true for groups that do not have to deal with radically changing environments. Nevertheless, this proposition suggests that justice is intrinsically concerned with both individual well-being and societal functioning. The “natural values of justice” are thus the values which foster effective social cooperation to promote individual well-being. Here, I am using the term “cooperation” broadly to include working out ways of not interfering with or bothering each other and also developing accepted procedures for engaging in conflict and competition.

It is evident that the specific ways of interrelating so as to foster social cooperation most effectively to promote individual well-being (and, in my view, a “just world” will do this) depend upon the external circumstances confronting the group and upon the specific characteristics of the individuals composing it. Thus, the distributive values operative in a just world will and should depend upon circumstances. Under some conditions distributing rewards according to individual need will be more just, and under other conditions allocating in terms of individual productivity will be more so. Similarly, the use of group quotas may be viewed as an unjust practice when it is used to exclude and thus to discriminate against members of disadvantaged groups, but considered a desirable practice when used to...
continued discrimination against a group that has been previously subjected to bias.

The foregoing is not meant to imply that justice is completely situational. There are undoubtedly some minimal conditions of individual well-being and human dignity which are necessary to sustain continued cooperative participation in a group's activities and vice versa. The standards for determining minimal are both absolute and relative: An individual can survive physically with a certain minimum of food and shelter but, perhaps, not psychologically if that minimum is below the socially defined level of "livability." Similarly, the minimum standard of human dignity and for the will to live competently are both absolute and relative: An individual can tolerate only a certain degree of inconsistency, rejection, isolation, abuse, or terror from his group before he no longer will be willing or competent to cooperate; his threshold of tolerance for such practices will undoubtedly decrease if he sees that others are not treated similarly.

Earlier, I proposed that justice requires effective social cooperation. There are undoubtedly some minimal conditions of social order and group integration that are necessary to individual well-being and human dignity. Famine, drug addiction, thievery, civil disorder, and violence are often prevalent in societies that are characterized by lack of planning, ineffectual leadership, chaotic organization, poorly developed communication networks, insufficient allocation of resources to the development and utilization of its productive capabilities. (Compare, as an example, the well-being and dignity of the average person in China today and a century ago.) Just as one finds that emotional stress and disturbances are most prevalent in those areas of society which are the most neglected and most poorly organized—i.e., among the old, the poor, the victimized—so one would expect that physical disorder and emotional disturbance would be most prevalent in ineffectual, disorganized societies.

The Scope of Justice

My preceding discussion has limited the concept of justice so that it is applicable only to social relations or social systems in which there is perceived to be at least a minimal degree of actual, normatively expected, or potential cooperation. Thus, unless one shares Albert Schweitzer's reverence for all living creatures, one would not feel it to be unjust if one killed an annoying mosquito or caught a fish to eat for dinner. Similarly, justice is not involved in relations with others—such as, heathens, "inferior races," heretics, "perverts"—who are perceived to be outside one's potential moral community or opposed to it. An implication of this line of reasoning is that the narrower one's conception of one's community, the narrower will be the scope of situations in which one's actions will be governed by considerations of justice. It has been reported that Eichmann, a mass murderer of Jews in the Nazi era, was a good family man. Similarly, the New England captains of the ships that raided the African coasts for slaves and transported them to the Americas under the most brutal conditions were commonly leaders of their local churches.

On the other hand, if one takes all mankind as one's community, it is evident that the scope of applicability of one's concept of justice will be wide: as wide as those advanced by the many moral philosophers who have written from a universalistic rather than parochial perspective. A still wider scope of applicability is inherent, as I have suggested above, in the Schweitzerian "reverence for life." The widest scope is perhaps the one contained in the perspective which views all of nature as one community.

Cooperation and Justice

Is it unduly limiting to restrict the concept of justice to situations in which there is at least a minimal degree of actual or potential cooperation? Cannot injustice occur even in bitter combat between deadly enemies? In my view, it can only occur in such a situation if the enemies exist within a community which has defined the rules and procedures for the conduct of the strife, as for example in a duel of honor. The broader community may feel that the way the struggle is being conducted may threaten general well-being or undermine values which are important to the maintenance of the community.

To sum up so far, the concept of justice is concerned with the distribution of the conditions and goods which affect the well-being of the individual members of a group or community. The essential values of justice are those values which foster effective social cooperation to promote individual well-being. It is evident that particular socio-historical circumstances will play a role in determining the individual and social effectiveness of the many alternative, possible values which could be employed as a basis for the distribution of benefits and harms. Nevertheless, there are undoubtedly minimal conditions of individual well-being and dignity which are essential to effective social cooperation as well as minimal conditions of social order and coherence which...
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necessary to individual well-being. The sense of injustice can be
aroused in relation to the values underlying the distribution of
benefits and harms, the rules by which the values are opera-
tionalized, the implementation of the rules, or the procedures
for determining which values, rules, or practices shall be employed.
The scope of applicability of one's concepts of justice is determined
by the scope of one's perceived community.

Three basic questions emerge from these considerations. What
conditions determine which values will be employed as the basis
of justice? What decision-making procedures about values, rules,
implementation, etc. are likely to be accepted as just? What factors
affect the scope of justice? I will here consider the first question
only.

DETERMINANTS OF THE VALUE BASE

Lerner (1974) and Levethal (in press) have indicated that
there are a variety of principles or values that can be used as
a basis for distributing outcomes, and have stated a number of
hypotheses about the conditions which give rise to the different
values. I have proposed (Deutsch, Note 1) similar ideas. Namely:

In cooperative relations in which economic productivity is a primary
goal, equity rather than equality or need will be the dominant principle
of distributive justice.

In cooperative relations in which the fostering or maintenance of
enjoyable social relations is the common goal, equality will be the
dominant principle of distributive justice.

In cooperative relations in which the fostering of personal development
and personal welfare is the common goal, need will be the dominant
principle of distributive justice.

I shall outline briefly the theoretical underpinnings of these
propositions.

1. In cooperative relations in which economic productivity is a
primary goal, equity rather than equality or need will be the dominant
principle of distributive justice. The rational allocation of resources
to achieve desired ends, given a condition of scarcity such that
not all desired ends can be achieved by the available means, results
in a competition among ends for the available limited means.
In a cooperative system which is trying to maximize production,
the end which can produce the highest return from the use of
a given means should be assigned that means. By similar reasoning,
one could deduce that a person who can more effectively utilize
a given scarce resource as a means of production than another
person should have greater claim to its use. Assigning scarce
resources of production to those most able to use them is likely
to result in the largest production and is socially equitable in
the sense that those who receive the largest input of resources
from a cooperative system should be the ones who produce the
largest amount for that system.

This turns the usual equity formulation upside down: The
input to the individual is of resources of production and his
output to the system consists of activities involved in producing
things of intrinsic value (consumer goods) or of instrumental
value (economic goods or means of production). The usual equity
formulation states a proportionality between the individual's
outcome of rewards and costs (i.e., of things of intrinsic value)
and his inputs or contributions of assets or liabilities. The implication
in the customary formulation is that the individual's relative
input to the group outcome will determine his relative share
of it (to each according to his contribution). The present formulation
suggests that in pure cooperative systems a person's share
of economic goods should be determined by his relative skill
in using such goods for the common weal and that he should
share in the consumer goods with others according to need (from
each according to his ability, to each according to his need).

The assumption underlying the customary formulation is that
people will be unwilling to make relatively high inputs unless
they can look forward to relatively high individual outcomes.
Presumably, their reluctance is based on some inherent notion
of fairness: "Fairness" is necessary to account for those who
experience an inequitable advantage (get more than their input
warrants) as well as those who feel they get less than their
contribution deserves. However, many ethical systems would not
consider it "fair" for someone to be given a relatively greater
or smaller reward simply because he possesses greater resources
for contributing to the group's productivity. Such systems assume
that it is the obligation of all members to contribute as fully
as they can and if they do so they are all entitled to equal shares
or to shares that are proportionate to their needs.

What, then, gives the individual who contributes more to
a group's product the seeming legitimacy for a greater share
of the group's rewards? Much research has documented this
legitimacy (Walster, et al., 1973; Adans & Freedman, in press;
Leventhal, in press) and everyday observation is consistent with
this research. The question has two related answers. Inherent
in economic rationality is a tendency for econo...
throughout a culture with the consequence that people come to be regarded primarily in terms of their economic utility (Dinesh, 1962). The evaluation of people in terms of their usefulness leads to the view that is is more optimal economically to fulfill the needs of those who are more rather than less useful. A second basis of the legitimization of differential rewards for differential contributions inheres in the potential power available to those who have the capability of contributing much to the group’s welfare. They may be tempted to use their superior productivity to obtain power over other group members and over the group decision-making processes. Under some conditions, such attempts will be successful and will enable those who succeed to determine what principle of justice will be employed in allocating the group’s product. It seems likely that those who have been tempted to accumulate power will find this version of the equity principle congenial to their interests since it can be readily interpreted to justify greater rewards to those who have greater power.

To recapitulate, it is suggested that if a cooperative system is oriented toward increasing its economic productivity, its rational tendency will be to allocate its economic functions and goods (resources, roles, and means of production) to those most able to use them effectively, but to allocate its rewards (consumer goods) according to need or equality (if more than a bare necessity is available). However, it is also suggested that inherent pathologies in the extension of economic values throughout a society or in the temptation to accumulate personal power may give rise to an equity principle which allocates rewards, prestige, and power as well as economic functions and goods to those who appear to contribute the most to the group. This equity principle, over the long run, is likely to be dysfunctional for groups, economically as well as socially. Economically, by allocating rewards and power disproportionately, it enables those who are in power to bias the system of allocation to perpetuate their disproportionate rewards and power even when they are no longer making relatively large contributions to the group’s well-being. Socially, it tends to foster the introduction of economic values in all aspects of social life with a resultant loss to the quality of life. As Diesing (1962) has written:

A person becomes alienated from his possessions and creations when he learns to regard them as utilities which have value because other people desire them; he becomes alienated from other people when they are perceived as competing with him for scarce goods; and he becomes alienated from himself when he sees his own value as a utility based on the desires of others. (p. 93)

2. In cooperative relations in which the fostering or maintenance of enjoyable social relations is a primary emphasis, equality will be the dominant principle of distributive justice. An enjoyable social relation presupposes that one feels respected and esteemed by the other persons involved in the relationship; and if the primary purpose of the relationship is its intrinsic enjoyment, then mutual esteem is a necessary condition for its survival. I suggest that allocation according to the principle of equality tends to be disruptive of social relations because it undermines the bases for mutual respect and self-respect necessary for enjoyment of such relations. It does this by signifying that the different participants in the relationship do not have the same value. A relatively low evaluation may lead to envy, self-devaluation, or conflict over the valuations—all of which may destroy the enjoyability of the relationship for those who are favored by equitable allocations as well as those who are not. Moreover, respect and esteem are more valuable if they are received from those whom one respects; equal status relations represent the optimum distribution of status for the mutual support of self-esteem. Thus, the principle of equality is more congenial to the fostering of enjoyable, personal relations. It supports the basis for mutual respect which underlies such relations and it does not evoke the deleterious emotions which undermine them.

3. In cooperative relations in which the fostering of personal development and personal welfare is the primary goal, need will be the dominant principle of distributive justice. The duty to help another who is in need or in jeopardy, providing one can do so without excessive loss or risk to oneself, is, as Rawls (1971) has pointed out, one of the natural duties of the members of a group: “In each single instance the gain to the person who needs help far outweighs the loss of those required to assist him” (p. 338). As Rawls suggests, the primary value of the principle is not measured by the help we might receive if we were in need or danger but rather by the sense of confidence and trust in other men’s good intentions. It is hard to conceive that a group could be regarded as cooperative if it were publicly known that the duty to help another who was in need or danger were rejected by its members.

It is evident that the duty to help another is intensified in relation to those for whose personal development and welfare we are responsible, such as those who are considered to be legitimately dependent upon us. It is also
and institutions which have as a primary concern the personal development and welfare of their members or charges—the family, hospitals, schools, etc. Hence, we are more likely to follow the principle of need than that of equality or equity in allocating resources in such relations. More of the family resources will be spent on a sick child than a well one; a critically-ill patient will draw more attention from hospital personnel than a not-so-ill one.

To allocate resources equally or according to the relative contributions of its members rather than according to need would obviously be disruptive of any group that has a primary concern for the development and welfare of its members. It is apparent that individuals' needs fluctuate and it is unlikely that the needs of members will always be equal to one another or proportionate to their relative contributions. Thus, if at a particular time an individual has a need that is important to his survival, development, or well-being, he must have access to the resources for satisfying his need independently of whether doing so is socially equitable or equal in the short run. If he does not, he may suffer an irremediable harm or loss. If he does suffer such a harm, this would be obviously detrimental to the group's concern about his well-being, and also detrimental to his future ability to participate in the group as a competent member.

Our discussion has suggested that the tendency for economically-oriented groups to use the principle of equity, for solidarity-oriented groups to use the principle of equality, and for caring-oriented groups to use the principle of need as the basic value underlying the system of distributive justice. Most actual groups have more than one orientation and, in so far as they do, they will experience conflict between them unless they can segregate the contexts and situations in which the different orientations come into play or unless they can make one orientation dominant over the others.

When is one orientation rather than another likely to predominate in a group or social system? Let me offer a very crude and tentative hypothesis which I have elaborated elsewhere in a different context—the explanation of the determinants of constructive and destructive processes of conflict resolution (Deutsch, 1973). The hypothesis is that the typical consequences of a given type of social relation tend to elicit that relation.

Among the typical consequences of an economic orientation (Diesing, 1962) are: (a) the development of a set of values which includes maximization, a means-end schema, neutrality or impartiality with regard to means, and competition; (b) the turning of man and everything associated with him into commodities—including labor, time, land, capital, personality, social relations, ideas, art, and enjoyment; (c) the development of measurement procedures which enable the value of different amounts and types of commodities to be compared; (d) the tendency for economic activities to expand in scope and size. The crude hypothesis advanced above would imply that if a social situation were characterized by impersonality, competition, maximization, an emphasis on comparability rather than uniqueness, largeness in size or scope, etc., then an economic orientation and the principle of equity are likely to be dominant in the group or social system. Specific experimental hypotheses could readily be elaborated: The more competitive the people are in a group, the more likely they are to use equity rather than equality or need as the principle of distributive justice; the more impersonal the relations of the members of a group are, the more likely they are to use equity; and so forth.

In the same manner, one could detail the typical consequences of a solidarity-oriented group or society. These include: (a) the development of a set of values that emphasizes personal ties to other group members, group loyalty, mutual respect, personal equality, and cooperation; (b) uniqueness of attachments to people, activities, and objects associated with the group so that they are unexchangeable and therefore of absolute value; and (c) the development of integrative procedures to reduce role conflicts, misunderstanding, and other sources of interpersonal hostility within the group. With such typical consequences in mind, one could elaborate a variety of experimental hypotheses: The more face-to-face contact that members of a group have, provided none of them are considered to be in a dependent status, the more likely they are to use equality rather than equity or need; the greater the degree of friendship that exists within the group, the more likely they are to use equality; etc.

The caring and the solidarity orientations have much in common and both differ in similar ways from the economic orientation. However, the caring-orientation is characterized by a more direct and explicit responsibility for the fostering of the personal development and personal welfare of the others in the group. Additionally, the caring relationship may involve dependents of unequal status as well as others of equal status. Typical consequences of a caring orientation include: (a) the development of a set of values which stresses responsibility for the other.