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REVIEW

REVISED The views on distributive justice and economic inequality revisited: the political philosophy and the economic perspectives on (in)equality

[version 2; peer review: 1 approved with reservations, 4 not approved]

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Abstract

This review attempts to provide pointers to some of the parallel evolution of the concept of distributive justice put forward by philosophers, political scientists, sociologists, historians, and economists. In political philosophy, debates originating in the 17th century have primarily focused on the conditions for redistribution, the definition of justice, and how to make society more just. These debates have evolved from discussions between egalitarians and utilitarians to modern theories of capabilities and inequality of opportunity. Economic inequality from the economists perspective is often linked to the measurement of socioeconomic conditions at a specific point in time (although initial conditions or future income may also be considered), and often does not include considerations of fairness or institutional guarantees of liberty, equal opportunity, or fair distribution. This review emphasizes that distributive justice and inequality are separate concepts with separate discussions. Political philosophers debate distributive justice along multiple axes, including utilitarian and egalitarian perspectives, as well as theories of ex ante inequality of opportunity and capabilities. In contrast, economists focus on issues such as measurement, the existence of an efficiency/inequality trade-off, and the endogeneity of inequality.

Keywords

economic inequality, distributive justice, political economy, history of ideas, political philosophy

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REVISED **Amendments from Version 1**

The new version implements major changes as suggested by the reviewers. Firstly, it has a modified title and presents the development of theories of economic inequality and distributional justice in a parallel dimension rather than a direct debate. Secondly, there is a careful reassessment of the political philosopher's side of the debate in terms of formulations and usage of consistent terms throughout the text. Thirdly, two theories - "The race between technology and education" by Tinbergen (1975) and Goldin and Katz (2009), as well as the hypothesis of Routine Bias Technological Change (RBTC) - have been added and thoroughly discussed. Finally, the new version has undergone major editing and language checks.

Any further responses from the reviewers can be found at the end of the article

Introduction

The academic literature on inequality, including its causes (Gornick & Jäntti, 2014), consequences (Blank, 2011; Chauvel & Schröder, 2015; Clark *et al.*, 2008; Hertel-Fernandez, 2019; Pickett & Wilksinson, 2015; Stiglitz, 2012; Western, 2006) and measurement innovations (Atkinson, 2015), is rapidly expanding. New works are multidisciplinary - often borrowing concepts from philosophy (Brunori & Neidhöfer, 2021), sociology (Corak, 2004; Corak, 2013) and other disciplines (Krieger, 2016). However, despite the abundance of new empirical work on various aspects of inequality, there is often a disregard for the careful usage of concepts according to the contexts of the debates of their own disciplines. This necessitates a step back and a careful reassessment of the main debates and history of ideas on inequality.

This study provides a review of developments in the literature from political philosophers and economists by examining the historical evolution of perspectives on economic inequality and distributive justice. It serves as a starting point for students and new learners of socioeconomic inequality from an interdisciplinary perspective. In addition, it also focuses on the causes of inequality, which has been a major part of how economists have approached economic inequality.

This review emphasizes that distributive justice and inequality are separate concepts with separate discussions. Political philosophers debate distributive justice along multiple axes, including utilitarian and egalitarian perspectives, as well as theories of ex ante inequality of opportunity and capabilities. Other key points of disagreement include the grounds for distribution and the distributive principle between theorists of distributive justice and libertarians. In contrast, economists focus on issues such as measurement, the existence of an efficiency/inequality trade-off, the endogeneity of inequality, and the main causes of it.

While political philosophers like Rawls have influenced economics, and economist-philosophers like Sen and Roemer have effectively bridged the divide between the two disciplines, there is limited communication between them. Economic theories tend to be utilitarian and positive (as opposed to normative), while political philosophy theories are mostly normative and concerned with fairness.

This review is organized as follows. The first section presents the evolution of the debate on distributive inequality from the perspective of political philosophy. The subsequent section introduces the debate on economic inequality from the perspective of economists. The final section discusses the results and provides a conclusion.

Political philosophers on equality (distributive justice)

Distributive justice has been a major topic in political philosophy since Plato, with earlier works by Aristotle, John Locke, Jeremy Bentham, and Karl Marx all referring to it throughout time. While Rawls' (1971) work is certainly the most influential in this literature, distributive justice has continued to be a significant topic ever since, generating a lively debate and a large number of publications from the last third of the 20th century and ongoing. Modern political philosophers have picked up where their antecedents left off, drawing influences that are hard to trace exactly. Table 1 presents a comprehensive overview of the main theories of inequality of political philosophy.

Utilitarianism

Utilitarianism, represented by 19th-century philosophers such as John Stuart Mill, Henry Sidgwick, and Jeremy Bentham, is one philosophical idea that relates to economic inequality. While paraphrasing Bentham's (1996) definition of utility in the late 17th (edited in the early 18th century), it is a property of something to produce benefit, advantage, pleasure, good, or happiness, or to prevent losses for the happiness of a community (or an individual) (p.6). Following the logic of the greatest happiness for the greatest number, utilitarianism focuses on maximizing utility rather than equality. Happiness or utility can be quantified using the arithmetical difference between those who are better off and those who are worse off. As a result of the calculations, an average amount of happiness of the whole population is computed (average utilitarianism). Alternatively, the total amount of happiness of a particular population is the sum of the individual happiness of each member (total utilitarianism).

Evidently, utilitarian theory raises multiple questions of moral ground. The criticism over the utility calculus (Adams, 1976), the debate whether happiness of the worse off should be maximized (or struggles minimized) (Popper, 1945), and whether actions should be chosen based on their likely results are all important pieces of ethical theory (Brandt & Hooker, 1994).

Egalitarianism

The main criticism of utilitarianism comes on two questions. First, some people might have expensive tastes or a different sense of happiness, depending on circumstances or personal

Table 1. Summary of theories of inequality (distributive justice).

No.	Theories of Inequality/ Distributive Justice	Authors	School of Thought	Main Thesis	Connection to Other Theories /Critique
1	Utilitarianism	Bentham, Mill and Sidgwick (18–19th century)	Utilitarian	the greatest happiness for the greatest number	by Roemer (1998a): individual utility is a measure of pleasure –subjective; by Dworkin: welfare - pleasure and avoidance of pain (p.193)
2	Theory of Justice as Fairness	John Rawls (1971)	Egalitarianism/ Liberalism	rejects welfare as a metric of justice, and proposes two principles to ensure the greatest possible amount of liberty and equality for society.	Criticizes utilitarianism on the principle of *universal* liberty and moral pluralism
3	Equality of resources	(Dworkin (1981a); Dworkin (1981b))	Resource Egalitarianism	introducing the issue of responsibility as well as the duality of resources and welfare	Conflicting with welfarism, builds up on Rawls
4	Justice and equality	(Cohen (1989); Cohen (2008))	Egalitarianism/ Liberalism	Justice requires equality. The ideal society should be characterized by communal reciprocity. Although equality is a baseline, self-interest can be pursued to a reasonable extent, and freedom of occupational choice can be pursued.	Criticizes Rawls: the difference principle permits inequalities that reflect the relative scarcity of different skills and natural abilities; individuals should cultivate an egalitarian ethos instead (Moon, 2015)
5	Capabilities Approach	Sen (1992)	Sociological (roots in Egalitarianism, Marxism, Adam Smith and Aristotle)	Basic capability – a set of *functionings* needed for a sufficiently decent life.	Criticism by Roemer (1998a): the connection between primary goods and the achievement of life plans that produce happiness is not always due to capabilities. Criticism by Bourguignon (2017): capabilities are a normative concept to define poverty, rather than inequality
6	Horizontal Inequalities	Stewart (2009)	Sociological Approach (related to Sen's Capabilities Approach)	capability inequality trap (as well as their transmissibility throughout generations) as well as capital inequality trap, which includes interactions among different types of capital (human, cultural, social, and physical).	Focused on poverty and conflict
7	Equality of Opportunity	(Roemer (1998a); Roemer (1998b))	Deeply rooted in egalitarianism	Five elements: circumstance (similar to Dworkin (1981a), a person is not being held responsible), type, effort (the person is being held responsible), objective and policy.	Opposite to the Inequality of Outcome and ex post theories of inequality
8	Theory of distributive justice	Nozick (1974)	Right-libertarianism	Related to the notion of entitlement, justice in the sense of equal property rights	Builds up on Rawls (1971), adds up Lockean arguments on minimal involvement of the state

preferences. Second, the problem of comparability persists. Since a common ground for comparison of happiness between individuals, groups, or societies is hard to find, how do you compare inequality between populations? As a result, a separate group of philosophers- egalitarians (Rawls, Dworkin, Roemer, and others) emerged opposing the simplified definition by the utilitarians. For them, maximization of happiness as a direct redistribution of the greatest happiness for the greatest number of people *without* any conditions simply does not work.

John Rawls was among the first to question whether distributional equality might not require deviations from an equal base when this is in the interest of the worst-off group. In *A Theory of Justice* (1971), he summarizes his thesis on inequality in the two principles below.

- "First: Each person has an equal right to the most extensive total system of equal basic liberties compatible with a similar system of liberty for all.
- Second: Social and economic inequalities must be arranged so that they are both: (a) to the greatest benefit of the least advantaged, consistent with the principle of just savings, and (b) attached to offices and positions open to all under conditions of fair equality of opportunity. ' (p.53).

The first principle requires that citizens enjoy equal basic liberties, while the first part of the second principle requires fair equality of opportunity. The Difference Principle is the second part of the second principle of John Rawls's theory of justice, which holds that inequalities in the distribution of these goods are permissible only if they benefit the least well-off positions of society.

In Rawls' theoretical framework, inequality is tied to the principles of universal liberty. He presents his theory as 'justice as fairness' and considers certain primary social goods that a person is entitled to for a fair existence, regardless of its conception of the good. However, one challenge for Rawls' view is how to compare the situations of people who are unequal in different primary goods. To address this issue, Rawls measures the social welfare of society based on the welfare of the least well-off individual member of society, appealing to moral pluralism rather than welfarism[1].

Dworkin (1981a) contends that individuals should be compensated only for circumstances beyond their control. While criticizing Rawls heavily, he incorporates responsibility into distributive justice theory and introduces the concept of equality of resources. Dworkin's view on distributive justice ultimately concerns 'hypothetical insurance' a means of compensating people who suffer misfortune in the distribution of internal resources such as disability, ill health or lack of marketable skills (Clayton, 2015). He believes that ex ante equality may be achievable through limited redistributive compensation for those who are less fortunate. In the view of Dworkin, the equality of resources does not necessarily refer to physical commodities, but rather to the instruments that people use to achieve success or achieve life goals. He envisions equal treatment of individuals in two dimensions: resources and welfare, with the former representing his true meaning of distributive justice.

Cohen (2008) critiques Rawls' difference principle at its core, claiming that it is insufficiently egalitarian. He criticizes Rawls' account of justice for permitting a relative scarcity of different skills and natural abilities (a topic that Smith, Ferguson, Marx, and Durkheim). Cohen (1989) provides a political justification for his view that equality must not only be established through institutional design but also be an imperative for individuals. Unlike Rawls, who allows incentives to encourage individuals to use their talents for mutual benefit, Cohen criticizes incentives. Instead of viewing the 'basic structure' as the main subject of justice, he argues that individual citizens should cultivate an egalitarian ethos (Moon, 2015), allowing a just society to eliminate incentive payments as a means to encourage individuals to apply their talents in socially beneficial ways.

A fundamental difference between Rawls' and Cohen's views on justice lies in their respective conceptions of what justice is. Rawls defends the concept of justice as fairness and believes that justice cannot be derived through utilitarianism. In contrast, Cohen argues against the Rawlsian version of a just society in his book "Rescuing Justice and Equality" (2008), demonstrating that distributive justice does not tolerate deep inequality. Cohen charges Rawls' constructivism with systematically conflating the concept of justice with other concepts, focusing on the lack of justification 'based on facts about our condition'. For Cohen, if principles respond to facts, then principles at the summit of our conviction are grounded in no facts whatsoever (Cohen, 2008, p.229). He criticizes Rawls' constructivism and his use of the original position to determine the nature of justice, stating that it mistakenly identifies fundamental principles of justice with optimal rules for social regulation (Cohen, 2008, p.337). For Cohen, separating justice from facts such as publicity considerations and rules formation desiderata brings it closer to equality (Moon, 2015).

Capabilities approach

Amartya Sen's (1992) capability approach participates in the theoretical discussion of the concept of inequality by focusing on the difference in 'functionings' between people. The main argument of the approach is that poverty should not be measured solely by income distribution in lower percentiles but rather by a level of deprivation in various functionings such as literacy, good health, and political participation. Sen illustrates his argument with a simple example showing the difference between someone on a hunger strike and a starving person. By the end of the day, both have neither eaten nor earned wages. The main difference between the two is that a hunger striker has the ability to return to work and has a place to stay, while a starving person is deprived of these capabilities. Therefore, in Sen's reasoning, the starving person does not have the same functionings as someone on a hunger strike. In Sen's framework, capabilities refer to a set of functionings available to people. His concept of fair justice is when such capabilities are equalized at their highest possible level over all economic regimes so that functionings are freely available for all people.

While Amartya Sen's (1992) capability approach is insightful and innovative in its focus on the initial conditions that

[1] Welfarism is used throughout the text, referring to the theory, while utilitarians are referred to as a group of thinkers.

determine poverty for individuals or groups, it is not directly related to economic inequality. Rather, it is related to poverty, which is often associated with those in the lower part of the income or wealth distribution. However, larger inequality does not necessarily mean higher poverty, and vice versa. Poverty can be thought of as an inequality measure focused on the bottom of the distribution, but there is no 'spontaneous, general, and unidirectional relationship between growth, inequality, and poverty' (Atkinson & Bourguignon, 2001). It is important to note that Sen's view can be seen as one more view on what should be distributed - namely capabilities - alongside other egalitarian views such as Rawls' Difference Principle and Dworkin's ex ante equality, which focus on distributing primary goods resources or 'advantage'.

A modern take on capabilities presents horizontal inequality as a concept describing inequality among groups of individuals over a range of capabilities, rather than among individuals (vertical inequality) (Stewart, 2009). While building up on the social capital concept of Putnam (1993); Putnam (2000a), horizontal inequalities is defined as the one among culturally determined groups that have salience for their members and/or others in society, among races, ethnic groups, religions, regions, and so on. In Stewart's version (2009), Sen's capabilities are related to the participation of individuals, rather than to power. In addition, two main poverty traps are introduced: the capability inequality trap (as well as their transmissibility throughout generations) as well as capital inequality trap, which includes interactions among different types of capital (human, cultural, social, and physical). In addition, Stewart points there is a high rate of interaction between the two, but both lead to different asymmetries: in social capital, in attitudes (or cultural capital), discrimination as well as political powerlessness, each having long-term effects and intergenerational consequences. Overall, Stewart's arguments represent a legitimate and rigorous framework for alternative analysis of socioeconomic inequalities.

However, the main problem with the approach is the fact that the approach is focused on finding the link to poverty and conflict, rather than the consequences of inequality. The lines between the divisions of different groups are arbitrary, with some more salient than others.

Equality of opportunity

Roemer (1998a) proposes a new theory of equality of opportunity. Roemer (p.302, 1993; p.5, 1998a) suggests five categories to be considered in his theory: circumstance (similar to Dworkin, where a person is not held responsible), type, effort (where the person is held responsible), objective, and policy. Leveling the playing field for him means guaranteeing that those who apply equal degrees of effort towards their own objectives end up with equal achievement, regardless of their circumstances. Inequality of opportunity is essentially an ex ante concept concerned with an equal starting point, whereas much redistribution is related to ex post outcomes (Atkinson, 2015). However, Roemer does not consider the dynamics of inequalities after the opportunities have been equalized. Educational achievement, wealth, employment status, income, utility, or welfare are all various outcomes of inequality but all seem to be dynamic concepts. Roemer's theory must be used in conjunction with rigorous empirical models to fully contain its exploratory power.

Roemer argues that there is consequently a 'before' and an 'after' in the notion of equality of opportunity: before competition starts, opportunities must be equalized by social intervention if need be; but after it begins, individuals are on their own (Roemer, 1998a, p.2). This approach allows for individuals to be held accountable for achievements of particular objectives such as education employment health or income, while also ensuring that opportunities are equalized before competition starts.

Libertarian criticism of egalitarian theories of distributive justice

The theoretical debate in political philosophy continues with Robert Nozick's argument against Rawls in his book "Anarchy, State, and Utopia" (1974). Nozick's view contrasts sharply with Rawls' and the rest of egalitarians, basing his argument on the notion of legitimacy. In Nozick's theory, distributive justice is incompatible with individual rights and is directly related to the notion of entitlement. Justice is understood in terms of equal property rights. Nozick (1974, p.151) proposes three principles of justice that refer to entitlement and regulate the distribution of property: he proposes three principles of justice that refer to the notion of entitlement and regulate the distribution of property:

First: a person who acquires a holding in accordance with justice in acquisition is entitled to that holding.

Second: a person who acquires a holding in accordance with the principle of justice in transfer from someone else entitled to the holding is entitled to the holding.

Third: no one is entitled to a holding except by (repeated) applications of the first and second principles.

In addition, he argues for a minimal state whose function is to guarantee individual liberties before other rights. This mirrors libertarianism/liberalism (Locke, 1948), which holds that individual rights must be shown unconditional respect and opposes distribution within a welfare state.

Economic inequality: an economics perspective

While the main criticism of egalitarians is that utilitarians are not concerned about how well-being is distributed across individuals, and as far as it is maximally distributed, the economic thinking argues on three dimensions: the trade-off between the inequality and efficiency, the causes of inequality, and measurability of the models. As hinted at in the previous section, economic theories are almost exclusively utilitarian and positive (as opposed to normative economics). Similarly to the previous section on distributive justice, Table 2 presents a summary table of all economic theories of inequality in a relatively chronological order.

Table 2. Summary of economic theories of inequality.

No.	Theories of Economic Inequality	Authors	School of Thought	Main Thesis	Criticism	Empirical Evidence
1	Malthusian cycles (trap)	Malthus (1798)	Demographic	Differences in exponential growth of population versus linear growth of production of the means of substance produce inequality.	includes only demographic factors as the driving forces of social stratification and inequality, omitting multiple other variables	Historical examples of Babylonia, Classical Athens and 19th century England
2	Supply-demand labor theory (Heckscher - Ohlin Model)	Ohlin (1952)	Mainstream Economics	When borders open up for trade, high-skilled workers earn an even more premium pay at the expense of the lower-qualified workers, who find it hard to adapt to the new requirements dictated by the demand for qualified labor	does not include institutional as well as political factors; capital and labor are not easily substitutable	Cross-country, a minimal theoretical model, working under assumptions of full labor and capital mobility
3	Inverted u-shaped cycles of inequality	Kuznets (1955)	Mainstream Economics	as countries industrialize and average incomes grow, inequality will first increase and then decrease, resulting in an inverted U-shaped curve	Piketty, Atkinson, Milanović: theory of the past, modern empirical evidence contradicts the theory	Evidence supported on global scale until 1970s (the end of industrialization)
4	Global rise of economic inequality	(Piketty, 2014; Piketty, 2015)	Political Economy	the tendency of returns on capital to exceed the rate of economic growth (r>g)	Milanović: Both Piketty and Kuznets are correct, but for different time periods	data from twenty countries, 20th, 21st century (the US and France are the most vivid examples)
5	The Four Horsemen of Leveling of Inequality	Scheidel (2018)	Economic History	mass mobilization warfare (i), transformative revolution (ii), famine and state failure (iii), as well as lethal pandemics (iv) as the only historically proven cases where long-term inequality statistically decreased	complementary with the theory of malign forces of Milanović	Mainly historical data from prehistoric times, estimating the GINI coefficient using tax returns.
6	The Race Between Technology and Education	Goldin & Katz (2009), Tinbergen (1975)	Mainstream Economics	income distribution as the distribution of prices of the factors of production. The supply is the number of people in the labor force with a different number of years of education. Demand is differentiated according to quality (number of years of schooling) and prices (wages).	Wolfson (1979): the theory undermines the role of the tax structure design, as a determinant of the political process.	Data are mainly data from developed economies.
7	Skill-Biased Technological Change" hypothesis	Acemoglu & Autor, (2011); Goldin & Katz (2008; 2009); Katz & Autor (1999)	Political Economy	Due to fast technological growth, the increase in inequality is caused by the shift of demand in favor of more educated workers.	Goldin & Katz (2008): education is the key missing link that moderates the emergence of inequality	Mostly data from developed economies, but growing evidence around the world in support of the theory (Lee & Wie, 2015; Pi & Zhang, 2018).
8	Global Inequality	Bourguignon (2017), Milanović (2016)	Political Economy; Globalization-focused Theory	two Kuznets curves, currently in the second one of global inequality; income inequality among the citizens of the world, factored by population and globalization	the effect of global economic crisis on economic inequality is undermined	Evidence from large N household surveys Assumption of full mobility of capital

No.	Theories of Economic Inequality	Authors	School of Thought	Main Thesis	Criticism	Empirical Evidence
9	Measurement-driven. Real Distribution of Wealth	(Atkinson, 1975; Atkinson, 2015)	Applied Economics	a holistic understanding of what economic inequality consists of, includes: capital gains (accrued gains mainly for the top earners at the expense of middle-income groups), imputed rent (homeowners- top and bottom groups), fringe benefits and home production (non-capital);	communicates well with Amartya Sen's and John Roemer. Equality of opportunity as *ex ante* and inequality of outcome as *ex post* – intergenerational accumulation of wealth.	Luxembourg Income Study (LIS) which coordinates a vast cross-country household income survey, also combining administrative (tax filing) data
10	Welfare State	Stiglitz (2017)	New Keynesian Economics	no trade-off between economic performance (growth, efficiency, stability) and equality; Equal access to labor markets is at the core of his argument	policy-driven take on welfare-state; empirical examples are country-specific	The 20th and 21st century United States
11	Functional aspects of inequality	Ray (1998)	Development Economics	inequality in incomes may be compatible with overall equality (in the system) because a society might display a high degree of mobility; the question of how income is earned has just as much social value as how much is earned. Trade-off between Efficiency and Inequality	adds facets to the mainstream economic thought on inequality Okun (2015)	Theoretical Model
12	Institutionalism	(Acemoglu & Robinson, 2005; Acemoglu & Robinson, 2013)	Institutional Approach	synergy between inclusive economic and political institutions that induces economic development	does not explicitly consider economic inequality as the dependent variable. Milanović (2016): concentrated political power, does not necessarily entail concentrated economic power	Various case studies. South/North Korea as well as a city divided by a border between Mexico and the US

One of the first economic theories that has started to tackle issues related to economic inequality is Malthusian cycles, described in one of the most influential works by Thomas Malthus in 1798. It focuses on the differences in exponential growth of population versus linear growth of production of the means of substance, triggering inequalities along with other consequences. According to the theory, with the passing of time, higher mean income and lower inequality trigger a population increase among the poor, reducing their wages; thus, pushing inequality up with the further population growth. However, this theory includes only demographic factors as the driving forces of social stratification and inequality, omitting multiple other variables. It is also known as the theory of the past, drawing empirical examples to the time of the past Babylonia, Classical Athens, and 18th century England, making it almost inapplicable especially for the period of industrial revolution, where other factors besides demographic ones came into play.

The economic thinking of mid-20th century modernization produced the main mainstream economic explanation of economic inequality, focusing on the supply and demand logic. Assuming the mobility of capital and labor, the theories of that time present economic inequality in the form of a simple ratio of wages of skilled over unskilled workers. As demand increases for highly skilled specialists, their wages increase at a higher pace, as compared to the wages of the low-skilled workers, who are lagging. In the context of a globalized world, where capital mobility is at unprecedented levels and labor can be substituted with capital (neoclassical economics) inequality rises simply as the result of globalization. More precisely, a simple Ohlin (1952) model is at play here: two perfectly competitive markets with highly skilled workers earning a premium on their wage as well as low-skilled worker in a labor-intensive system. These two markets are isolated from each other; however, when borders open for trade due to globalization, the markets converge into one with high-skilled workers earning even more premium pay at the expense of lower-qualified workers, who find it hard to adapt to the new requirements driven by the demand for qualified labor. In addition, technological innovations also affect mainly low-skilled workers, creating demand for those with better education, making those who are left behind not able to profit from the new system. Nevertheless, such a model and the view are quite static, which does not consider evident externalities and shortages, barriers to mobility of factors of production, as well as the fact that in the real world, capital and labor are not easily substitutable. Although quite advanced as compared to previous attempts at creating a model of inequality, it remains overly simplistic, with institutional as well as political factors excluded from it.

Around the same time, Kuznets (1955) presented the relationship between the level of development and inequality as an inverted u-shaped curve, being one of the first authors specifically focusing on economic inequality. The logic behind the curve is simple: as countries industrialize and average incomes grow, economic inequality will first increase and then decrease, resulting in an inverted u-shaped curve. For Kuznets (1955), rising inequality is the product of various economic forces and a gradual end of structured transformation. Empirical studies point that the distribution of inequality follows such a shape, however, mostly in the historical periods of the 18th- the first half of the 20th century. Simon Kuznets's contribution to the field, although not comprehensive, is the first one to focus on economic inequality as the dependent variable for research; however, its explanatory power in other time periods is not universal.

Kuznets' waves/cycles have faced empirical challenges over time. For instance, Huang *et al*. (2012) use new data to show a U-shaped (not an inverted U-shaped) relationship between inequality and development in the US. Furthermore, the hypothesis of Kuznets has limited external validity in different historical and geographical contexts, especially for developing countries that differ from the industrialized countries that Kuznets studied. Kuznets curves have also been applied to the development of institutions (Martinez-Navarro *et al.*, 2022), and pollution (Balsalobre-Lorente *et al.*, 2022), which found inverted U-shaped distribution as well.

In a major contribution to the field of economic inequality, Piketty (2014) found evidence that due to the tendency of returns on capital to exceed the rate of economic growth, the long-term economic inequality has been constantly on the rise in the 20th and 21st centuries in the western world. In addition, he has shown it empirically on the example of time-series of tax returns data from twenty countries (the US and France are the most vivid examples). This goes against the previously proven Kuznets inverted U-shape curve, which, although empirically proven for the earlier time period, could not explain the rise of inequality from 1980s onward. According to Piketty, in 1980s a new technological revolution caused the rise of inequalities, as new technologies strongly rewarded more highly skilled labor, driving up the share/return on capital, with capital becoming harder to tax in the globalized world.

In the debate of who is right and wrong, Milanović (2016) showed empirically that both Piketty and Kuznets are correct in their assessment: while Kuznets cycles explain the long-term rise and decrease of inequality in the -early 20th century, Piketty provided evidence for the increase of inequality in the 20th - 21st centuries. Moreover, going even forward, he reconciles the two opposing views by the economists, changing the context: instead of one long-term Kuznets cycle, he proposes to have two, ending the first Kuznets cycle of decreasing inequality at the end of 1980s, and drawing another one from 1980s until now, meaning that current times of rising national inequalities is the beginning of the second cycle.

Scheidel (2018) introduces historical perspectives into the discussion of economic inequality. He concentrates on cycles of compression, narrowing the gap between the rich and poor, and leveling, minimizing the GINI coefficient, tracing both back to the prehistoric times. While focusing on the

distribution of material resources within societies, rather than between different countries, Scheidel identifies the 'The Four Horsemen of Leveling': (i) mass mobilization warfare, (ii)transformative revolution, (iii)famine and state failure, as well as (iv) lethal pandemics as the only historically proven cases where long-term inequality statistically decreased. The core of his argument is that to level out equality, an event needs to be violent, thus belonging to one of the above-mentioned horsemen. He continues that peaceful leveling used to be an extremely rare phenomenon, as inequality in the distribution of (disposable) income cannot rise forever. Scheidel (2018) also points to Piketty's (2014) weakness in oversimplification of the effects of the war on inequality through the generalization of the experience of France as a case study example and the application of it to a wider group of countries. A historical perspective, although highly insightful, does not provide the tools for analysis in the cross-country context.

Supply and demand theories and the role of technology

Economic inequality has also been tackled from the perspective of supply and demand. First proposed by Tinbergen (1975) and later developed by Goldin and Katz (2009), "the race between technology and education" theory sees income distribution as the distribution of prices of the factors of production. The supply is described by the number of people in the labor force with a different number of years of education. Demand is differentiated according to quality (number of years of schooling) and prices (wages) in the main sectors of production: agriculture, manufacturing, trade and transport, and other services. The measure of dispersion or by deciles (in particular, the highest) expressed in terms of the median is later applied to calculate the level of inequality. Further developments in the literature pointed to the growing role of institutional factors (Freeman & Katz, 1994; Katz & Autor, 1999) - changes in unionization, minimum wages, and labor codes. Wolfson (1979) provides criticism to the theory that it undermines the role of the tax structure design, that is, determined by public choice and ultimately a determinant of the political process. In addition, what seems to be missing from the theory is the level of acceptable level of inequality that is tolerable in a society without major societal grievances.

Another theory on the rise of inequality focuses on the effect of technological progress. The essence of the hypothesis of 'Skill-Biased Technological Change' (SBTC) (Acemoglu & Autor, 2011; Goldin & Katz, 2008; Goldin & Katz, 2009; Katz & Autor, 1999) is that the increase in inequality is caused by the shift in demand in favor of more educated workers. Since technological change favors replacing labor in routine tasks due to robotization (routine-biased technological change), it decreases the demand for middling relative to high-skilled and low-skilled occupations. Job polarization within and between industries has been documented as the main consequences of it in most advanced economies (Goos *et al.*, 2014).

Addressing the criticism of the above-mentioned theory, Goldin and Katz (2008) provided evidence of a key moderating variable that slows the emergence of inequality. Looking back at the two previous centuries, they provide evidence that educational progress is the key missing link between technological change and inequality. Focusing on the example of the United States, they claim that throughout its history, when economic inequality has been at its lowest, the American educational system has been built on the principles of egalitarianism. However, the post-1980 increase in within-country inequality is amplified by a slow down in the educational attainment of those at the bottom of income distribution, particularly for racial and ethnic minorities.

Recent studies have also found that rapid technological change increases economic inequality beyond the most developed economies (Lee & Wie, 2015; Pi & Zhang, 2018). Advancing technology seems to produce an increase in the relative demand for skilled and educated workers that cascades down to generations, boosting intergenerational human capital mobility in the long run (Gradstein *et al.*, 2004). Although job polarization is currently observed in some European and advanced economies (Kharlamova *et al.*, 2018), the result of technological factors as a key determinant of inequality dynamics on the global scale, crossing into the Global South seems to be a global phenomenon.

Global inequality

With the rise of global mobility of capital and the increase of mobility of labor, Milanović (2016) and Bourguignon (2017) introduce the importance of global inequality. Defined as income inequality among the citizens of the world, they present it as a sum of all national inequalities plus the sum of all gaps in mean incomes among countries. They are mostly concerned with the factors that influence inequality, rather than the consequences of the rising economic inequality, allowing for the effect to go both directions:

- "the study of economic inequalities for the last two centuries allows us to see how the world has changed, often in fundamental ways. Shifts in global inequality reflect the economic (and frequently political) rise, stagnation, and decline of countries, changes in inequality levels within countries, and transitions from one social system or political regime to another." (p.2, 2016).

Milanović (2016) theorizes that there are two kinds of forces that drive inequality down: malign forces: wars, natural catastrophes, epidemics (in line with Scheidel (2018), and benign forces: education, increased social transfers, and progressive taxation. The inclusion of other factors (including political) underlines the fact that while benign economic forces are the most important, social and political factors are crucial in terms of their effect on inequality. In his words, once political limitations disappear (the effects of predatory regimes, institutions, etc.), economic factors create a favorable environment for the mobility of capital. Referring to the historical perspective, he identifies the Industrial Revolution as a critical juncture that has turned the course of development of global (in-between countries) as well within countries' inequality around, turning them downward, as in Kuznets cycles. Concomitantly, Milanović (2016) undermines the effect of the global economic crisis as having the same potential effect on

economic inequality. This can be explained by data limitations, as well as a lack of comprehensive studies focusing on the equalizing effect of the years of the global financial crisis of 2008 as well during the post-crisis years of recovery.

Bourguignon's (2017) take on global inequality is in identifying two main forces that affect it: (i) the potential for growth in emerging markets and (ii) the process of globalization (which in his empirical examples has increased inequality within nations, decreasing it between nations). He builds up his argumentation on the mainstream economic theory of a trade-off between economic inefficiency and economic inequality, invoking a microeconomic argument that inequality creates disparities in the access of credit for individuals. Similar to Milanović (2016), he admits that inequality is not exogenous, but a product of an exogenous global economic phenomenon in addition to the economic policies or institutional reforms of a particular country. He also points to the inevitability of inequality in the current capitalist system. In case economic progress in a state is appropriated exclusively by a small elite, it undermines the stability of societies eventually. Reiterating the importance of political variables in the analysis, he introduces the discussion on the role of top income earners and the influence they have in the state. Overall, the addition of François Bourguignon to the debate is innovative, bringing the concept closer to the institutionalist and political economic point of view and opening the debate on the effect that growing inequality might have on other factors.

Different types of economic inequality?

The complexity of measuring economic inequality, as well as innovations related to it, is the focus for Anthony Atkinson in the book 'The Economics of Inequality' (1975). The definition of inequality for Atkinson is broad and complex, as it encompasses not only differences in income but also resources and needs (needs of a single person versus a family of four), tastes and choice (preferences), age and the life cycle, opportunity and outcome. In addition, he highlights inaccurate reporting (top and bottom groups), tax evasion and illegal income, capital gains (accrued gains mainly for the top earners at the expense of middle income groups), imputed rent (homeowners- top and bottom groups), fringe benefits, and home production (non-market services) as the main problems official statistics and administrative tax data are not able to tackle.

In his later book, 'Inequality.' What can be done?' *(2015)* he disaggregates the concept of economic inequality in two ways: equality of opportunity and inequality of outcome. He refers to the works of Sen and Roemer, for the former, and to the most standard measures of wealth, income or consumption in the latter. In addition, he relates the two features, inequality of opportunity as *ex ante* costs and inequality of outcome as *ex post* (transaction) costs, (referring to Williamson (1981) and North (1992)). Furthermore, Atkinson provides a thorough criticism of focusing exclusively on the inequality of outcome (usually by easily retrievable statistical data on income, wealth, or consumption) highlighting three main problems: (i)one cannot ignore those for whom the outcome is hardship; (ii) competitive versus noncompetitive equality of opportunity[2], as well as (iii) equality of opportunity for the next generation (intergenerational inequality). Additionally, he expands on (iii), connecting today's (t) *ex post results* with tomorrow's (t+1) *ex ante* playing field: beneficiaries of inequality of outcome today can transmit an unfair advantage to their children tomorrow (Atkinson, 2015, p.11). As inheritance accounts for a sizeable fraction of the wealth of the group of top-income earners, there is observed inequality of opportunity as well and should be taken into consideration when attempting to analyze holistically. Additional factors which might have a connection with the distribution of income: institutions of the labor market (trade unions themselves), employers and government (including bargaining power of trade unions on the internal labor market) as well as the development of institutions, especially pension funds, which stand between the productive sector of the economy and the household sector. In terms of the topic of economic inequality in the modern theoretical debate, he concludes that issues of redistribution are outside of the interests of main economic thought, as most mainstream economists mention focus on the three components of income, rent, profit, and wages, but rarely take them all into account comprehensively[3].

Joseph Stiglitz is another author who has been theorizing about economic inequality. In his seminal book 'The Welfare State in the Twenty-First Century' (2017), he states: 'The safety net is just something to prevent citizens from starving, but it is not designed to enable them to live a life with dignity or to give them the capabilities to be more self-supporting" (p.9). By generalizing that large groups in societies suffer from significant deprivation – youth, the elderly, and the poor of working age - on the example of the US, he vouches for the introduction of a welfare state. Equal access to labor markets is at the core of his argument, since unemployment and not employment is the real characteristic of the poor and raising the minimum wage will not necessarily have a big impact on poverty (2017 p.157). While insisting that there is no trade-off between economic performance (growth, efficiency, stability) and equality, Stiglitz vouches for the idea of widening the safety net, especially in countries with minimal welfare state.

Coming back to the mainstream understanding of economic inequality through the equality-efficiency dilemma (Okun, 2015), Debraj Ray (1998) adds several concepts to the model. He states that inequality in incomes may be compatible with general equality (in the system) because a society might show a high degree of mobility: the movement of people from one

[2] Competitive equality of opportunity means that people should have equal access to compete for scarce or desirable positions or resources, such as jobs, education, or income. Noncompetitive equality of opportunity means that people should have equal access to basic goods or services that are necessary for human dignity and well-being, such as health care, housing, or food. The difference is made in Atkinson (2015)

[3] Anthony Atkinson (2015) briefly mentions inequality of consumption as a possible alternative measure of economic inequality. However, it has various limitations when measured due to certain inherent differences in patterns of consumption across households, regions, and countries.

income class to another (contradicting Corak's findings (2004); Corak's findings (2013)). For Ray (1998), functional rather than personal distribution of income is the key to understanding how people earn income and how much social value it brings. Moreover, he states that: "inequality has a built-in tendency to beget inefficiency, because it does not permit people at the lower end of the wealth or income scale to fully exploit their capabilities" (Ray, 1998, p.237). As a conclusion, he identifies the three criteria for inequality measurement: (1) the anonymity principle (names do not matter), 2) the population principle (composition does not matter if the composition of different income classes stays the same in percentage terms), (3) the relative income principle (only relative incomes matter from a relatively poor to a relatively rich person, the inequality – increase). This is the view which was built up based on the mainstream economic theory basis, considering factors of social mobility and stratification, however, still missing the institutional, political, and/or perception variables. The main success of this theory is that it allows for a level of disaggregation of tax data coming from national or regional accounts into a more fine-grained analysis at the level, usually retrieved through a combination of tax information and survey data.

Institutionalism

Institutional accounts analyze inequality through the prism of democratization (Acemoglu & Robinson, 2000; Meltzer & Richard, 1981) which, if effective, is found to likely lead to increased taxation and redistribution (decreasing inequality). This is due to the changing nature of the *median* voter, who, in the context of the rise of the middle class, has become the most decisive and interested in widening the spread of the distribution (Rodriguez & Salas, 2014). Other, more recent works (Acemoglu *et al.*, 2015) have used advanced panel data methods and found the relation to be negative – with democratization increasing government taxation and revenue as fractions of GDP, arguing that "political reforms can be viewed as strategic decisions by the political elite to prevent widespread social unrest and revolution" (p.1167). Furthermore (Acemoglu & Robinson, 2005; Acemoglu & Robinson, 2013; Acemoglu *et al.,* 2015) point to the endogeneity in the relation between different aspects of democracies and economic inequality (also economic growth) and generally conclude that the impact of the political system on distribution depends on the laws, institutions, and policies enacted by the system. Earlier works by Acemoglu and Robinson (2005) also introduce different dimensions of analysis: democratization and consolidation (of democracy) emphasizing both political institutions (universal suffrage) and economic institutions (policy concessions, taxation systems, etc.) in the role of different paths towards democratization in a historical and cross-national perspective. While democratization is a credible commitment to future redistribution and as inequality increases, democracy becomes costlier to the elites, but consolidation might not be the case and not go hand-in-hand with the early stages of democratization (Acemoglu & Robinson, 2005).

Acemoglu & Robinson (2013) emphasize the synergy between inclusive economic and political institutions that induces economic development and lowers economic inequality. This is opposed to extractive institutions, which concentrate wealth among the narrow strata of population, creating inequalities of different kinds. By eliminating cultural arguments (geography, culture, and others), Acemoglu and Robinson (2013) demonstrate the dynamic and the interaction between the two types of institutions and how extractive economic and political institutions become inclusive from neatly picked comparative cross-country historical examples. Referring to the ideas put forward by institutionalists, the endogeneity in the interaction between economic inequality and institutions (democratization) is the key innovation, as the direction going both ways.

However, institutionalism has its critics as well. The lack of economic inequality can be artificially sustained even in regimes where political inequality exists and is built around extractive institutions. Milanović (2016) states that in some political regimes, such as the Soviet Union, concentrated political power, does not necessarily entail concentrated economic power (p.102). However, such a counterargument is based on a unique country case and would not prove robustness checks on a cross-country basis. However, it is not the institutions themselves which are the only affecting force in driving inequality down, but the difference between inclusive and extractive ones (country specific as well), which work towards economic prosperity of an individual, household, or a particular region.

Conclusions

This study provides a historical review of the parallel development of literature on distributive justice and inequality from the perspectives of political philosophers and economists. Debates among political philosophers, which originated in the 17th century, have primarily focused on conditions for redistribution, the definition of justice, and how to make society more just. These debates have evolved from discussions between egalitarians and utilitarians to modern theories of capabilities and inequality of opportunity. Ultimately, distributive justice is a normative term that describes what justice requires in terms of distribution within a society, with equality being one possible answer to that question.

The second part of this review examines the economic perspective on inequality, including its definition, measurement, and causes. It explores theories ranging from Malthusian cycles to global inequality, as well as functional and institutional aspects. Economic inequality is mostly linked to the measurement of socioeconomic conditions at a specific point in time (although initial conditions or future income may also be considered), and often does not include considerations of fairness or institutional guarantees of liberty, equal opportunity, or fair distribution.

This review shows that economists and political philosophers study different aspects of equality. For instance, there is no meaningful disagreement between Scheidel's theory of the 'Four Horsemen of Leveling' and Rawls' Theory of Justice, as these theories address different subjects: the causes of leveling and the characteristics of a just society, respectively. However, it is important to note that not all philosophers agree that equality is the goal, as documented in this review, and hence it cannot be assumed that all philosophers and economists share this view.

Data availability

No data are associated with this article.

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Open Peer Review

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Version 2

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?

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This is a nicely written and clear survey of the relevant literature. I am not an expert on the economic literature, but I do know the debates around Piketty and Acemoglu/Robinson and I don't see any obvious mistakes. The survey of accounts of inequality in political philosophy is clear and well-structured.

I only have three somewhat smallish comments:

1. It would be useful to flag colonialsm/imperialism as a potential source of economic inequality. See, as an example, Acemoglu et al. (2001[1]). Also, there is a tendency in the article to focus only on economic inequality within societies, but of course there is a robust debate about inequalities between, for example, the global south and the global north. I think it would be helpful to note these other elements, but even if you focus only on domestic inequality, there are colonialist/imperialist foundations of those inequalities. Or at least some will argue that there are and those discussions should be represented.

2. I am a little concerned that the two discussions are completely separated. Is there anything we can learn by comparing these two sets of literature and theoretical lenses? For example, do the various philosophical theories rely covertly on empirical assumptions, as some suggest is true about Rawls and "chain connectedness" and "close knittedness". See: Chung (2022[2]).

   Or, conversely, does the economics literature rely upon an impoverished conception of the normative values at play in inequality?

3. As an example of the latter, consider this line in the article: "the main criticism of egalitarians is that utilitarians are not concerned about how well-being is distributed across individuals..."

   In fairness, this is a perfectly acceptable way of understanding the "separateness of

persons" objection, but this way of understanding the complaint misses the theoretical richness of Rawls's approach. Importantly, Rawls does NOT make welfare, consumption, or income the primary element to be distributed in distributive justice. He famously uses primary goods that are based on the two moral powers and includes thinigs like rights, opportunities etc. On Rawls view, two people could be equal in "welfare" and certainly equal in income and yet be grossly unequal in terms of distributive justice. This seems like a massive difference between the philosophical literature and the economic literature: that economics is focused almost entirely on welfare functions whereas philosophers think of equality in other terms. Even those, like Cohen, who think "opportunity for welfare" is what should equal do not think that welfare is what should be equal.

My point here is that it is worth pointing out that a main criticism of the economic literature is that it is normatively impoverished such that it will have difficulty detecting these other, more subtle forms of inequality. Is this critique correct? Maybe, maybe not, but it seems like it is worthy flagging these various issues (the covert empirical assumptions of the philosophical accounts and the normative poverty of the economic accounts) as a way of bringing the two parts of the paper together.

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Is the topic of the review discussed comprehensively in the context of the current literature?

Yes

Are all factual statements correct and adequately supported by citations?

Yes

Is the review written in accessible language?

Yes

Are the conclusions drawn appropriate in the context of the current research literature?

Partly

Competing Interests: No competing interests were disclosed.

Reviewer Expertise: My expertise is in political philosophy; my ability to evaluate the economic theories in the second half of the paper is limited.

I confirm that I have read this submission and believe that I have an appropriate level of expertise to confirm that it is of an acceptable scientific standard, however I have significant reservations, as outlined above.

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This paper provides a very basic overview of some of the debates on inequAlity and distributive justice from the past 50 years. As a basic summary, it provides a sketch outline with a literature that almost everyone dealing with this question would be familiar. What makes the paper unsuitable for indexing is that it really has nothing to add to these debates. For one thing, it does not offer an evaluation of the different perspectives and the limitations and issues that they provoke. There is no mention of the new Marxian literature that has emerged over the past 20 years (with the exception of Roemer, and that is questionable) such as Harvey, and others) nor does it take into consideration the historical accounts of inequality that have been proliferating over the past 15 years or so and how these political theorists have assessed these debates from a new perspective (see Thompson, 2007; among others).

In the final analysis, there is little in this review that one could not easily find in many other basic reviews of the literature. Required is a more focused analysis on more recent debates and approaches as well as some degree of evaluation of the merits and limitations of these different approaches.

Is the topic of the review discussed comprehensively in the context of the current literature?
Partly

Are all factual statements correct and adequately supported by citations?
Yes

Is the review written in accessible language?
Yes

Are the conclusions drawn appropriate in the context of the current research literature?
No

Competing Interests: No competing interests were disclosed.

Reviewer Expertise: Inequality, democracy, social jusrtice

I confirm that I have read this submission and believe that I have an appropriate level of expertise to state that I do not consider it to be of an acceptable scientific standard, for

reasons outlined above.

Reviewer Report 29 June 2023

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Nunzio Ali
Department of Political and Social Sciences, University of Catania, Catania, Italy

The article is an attempt to provide a broad overview of the inequality literature both from the point of view of distributive theories of justice and economics by advancing two main assumptions; first, that 'distributive justice and inequality are separate concepts with separate discussions', and second, that 'there is limited communication between them [political philosophy and political economy]. Economic theories tend to be utilitarian and positive (as opposed to normative), while political philosophy theories are mostly normative and concerned with fairness' (introduction, p. 3). The article is divided into two parts, which do not dialogue with each other, in which a concise reconstruction is made of distributive theories (the first part) and economic theories (in the second). Although, it is welcome the effort to put in relation these two significant and rich debates, the article fails to show the plausibility of its central assumptions. On the contrary, we can find compelling evidence in the literature that the opposite is true.

First of all, distributive justice and inequality are indeed different concepts, but they are not separate concepts with separate discussions. On the contrary, they are strictly connected, both in egalitarian and anti-egalitarian theories. For example, intrinsic egalitarianism defends that inequality is bad or unjust *per se*; moderate egalitarianism argues that inequality is unfair when this translates into an unjustifiable shrinking of someone's share, and anti-egalitarian theories sustain that inequality is not a problem of justice at all. In any case, inequality is the main object of investigation for distributive justice. Secondly, it is not true that economic theories tend to be utilitarian and positive, as opposed to normative. Many economic theories are neither utilitarian nor anti-normative; on the opposite, they are also concerned with inequality of opportunity or outcome. On the other side, for many distributive theories of justice, the causes of inequality and the trade-off between efficiency and equality are relevant issues. Thus, the article fails to propose an accurate overview of the debate.

These shortcomings could be explained by some methodological flakes in the article that undermine the whole structure. An overview like the one proposed in the article is a task at the limit of feasibility for an article of ten pages but perhaps also of an entire book. The result is a list of the most common approaches in distributive and economic theories, which adds nothing to the debate. Furthermore, the need for synthesis likely leads to many inaccuracies. To remain in my main camp of study, political philosophy, I cannot help but notice how these inaccuracies also regard the description of Rawls' theory of justice; for example, when the article affirms that the Difference principle holds that inequalities in the distribution of primary goods are 'permissible only if they benefit the least well-off positions of society' (p. 5). However, as every student of Rawls

knows, it is not sufficient that inequality benefits the worst-off; rather, inequality is permissible only, and only if the worst-off's position is maximized. In addition, it is incorrect to assert that to address the problem of 'how to compare situations of people who are unequal in different primary goods' (p. 5), Rawls appeals to moral pluralism rather than welfarism. To solve the problem of identifying the worst-off in terms of primary goods, Rawls introduces the 'special conception' with the lexicographic order between principles of justice.

Suppose the article wanted to propose a reconstruction of the most important approaches to the debate. In that case, it should have chosen at least a few conceptual categories with which the reader could fully grasp the differences between the various accounts described. For example, distributive theories usually disagree about inequality along these central questions: Inequality *between whom*? (all human beings, groups, citizens, politically unified societies, or future generations); Inequality of '*what*'? (what 'good' or set of 'goods' should be distributed); How to *measure* this 'what'? (welfare, resource, primary good, or capability); According to which *patterned principles* should this 'what' be distributed? (The Difference principle, prioritarian principle, or sufficientarian principle). Some distributive theories may provide the same answer to a question while disagreeing with others. Another way to offer a useful and clear map of the distributive debate is to distinguish the main approaches for the ground of moral justification, whether utilitarian, contractualist, or deontological. In the debate, there are well-succeeded attempts to map the distributive debate that can be used as starting point (see: Holtug and Lippert-Rasmussen, 2007[1]; Hirose, 2014[2]; von Platz, 2020[3]). Moreover, the article fails to mention recent accounts in the contemporary debate on distributive justice, which focus on the top of the distribution (see: Robeyns 2020[4], 2022[5]) or on the size of the gap between the richest and the least advantaged (Pizzigati, 2018[6]; Alì, 2022[7]; Malleson, 2023[8]) marks a novelty in the field because theories of distributive justice often deal with the bottom of the distribution.

Finally, I believe that the main shortcoming is the complete absence of dialogue between the two parts of the article and, therefore between the disciplines – political philosophy and political economy – it intends to review. In this way, the article fails to provide a valuable and solid contribution. An extensive reformulation of the article would be highly desirable, trying to identify one or more points of contact between the two disciplines and showing, for example, a) In what specifically do they differ; b) Why it is crucial to maintain these differences; c) Whether and how greater multidisciplinary convergence is necessary.

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Is the topic of the review discussed comprehensively in the context of the current literature?
Yes

Are all factual statements correct and adequately supported by citations?
Partly

Is the review written in accessible language?
Yes

Are the conclusions drawn appropriate in the context of the current research literature?
Partly

Competing Interests: No competing interests were disclosed.

Reviewer Expertise: Political Philosophy; Political Theory

I confirm that I have read this submission and believe that I have an appropriate level of expertise to state that I do not consider it to be of an acceptable scientific standard, for reasons outlined above.

Reviewer Report 19 May 2023

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Juan Gabriel Rodriguez
ICAE, EQUALITAS and CEDESOG, Universidad Complutense de Madrid, Madrid, Spain

I very much appreciate the efforts made by the author in the new version of the article, he has tried to take my previous comments into consideration, although unfortunately the final result should not be indexed. The article as it is written does not correspond to reality and it is difficult to appreciate what it adds to our knowledge.

It is an article in which different ideas and proposals are intermingled, but where there is no script or storyline to give meaning to the whole. Thus, after setting out some conceptions of distributive justice (according to political philosophers), it reviews the concept of economic inequality (according to economists) with a discussion of the role of technology and globalization. After discussing possible different concepts of economic inequality, the article ends by commenting on the institutionalist view of inequality. With this amalgam of things, it is certainly difficult to offer the reader an idea that gives coherence to the article.

What is the main objective of the article? In the abstract, the author says that “This review attempts to provide pointers to some of the parallel evolution of the concept of distributive justice put forward by philosophers, political scientists, sociologists, historians, and economists.” But then he concludes that on the one hand political philosophers do one thing and economists do another. So, what is the point of the proposal? What can we learn from reading this article? What is the contribution of this research? Worse, the declaration of intent made in the abstract does not make sense to me: The sentence: “Economic inequality from the economists perspective is often linked to … and often does not include considerations of fairness or institutional guarantees of liberty, equal opportunity, or fair distribution.” is simply not true. Many economists have been dealing with issues of fairness, opportunity, and fair distributions for many decades.

The sentence: "This review emphasizes that distributive justice and inequality are separate concepts with separate discussions" is ambiguous. They are different concepts, but can anyone believe that distributive justice and inequality are separate concepts? Of course, they are not, whatever the field considered (economics, philosophy or any other) because they are closely related.

Finally, it is ridiculous to claim that economists only focus on measurement, the existence of an efficiency/inequality trade-off and the endogeneity of inequality. They are also concerned with distributive justice, and inequality of opportunity and capabilities. The Introduction follows in the same vein: In the first paragraph, when the author says "However, despite the abundance of new empirical work on various aspects of inequality, there is often a disregard for the careful usage of concepts according to the contexts of the debates of their own disciplines." On what basis? Can the author provide at least a few references where this problem is highlighted?

In the third paragraph, we can read again: “This review emphasizes that distributive justice and inequality are separate concepts with separate discussions.“ and “In contrast, economists focus on issues such as measurement, the existence of an efficiency/inequality trade-off, the endogeneity of inequality, and the main causes of it.”

In the fourth paragraph, the author insists that "Economic theories tend to be utilitarian and positive (as opposed to normative),..." which shows a great ignorance of what is done in economics.

I do not wish to be harsh in my analysis but after carefully re-reading the whole document I still cannot understand what is the fundamental argument that gives coherence to the amalgam of different things that make up the article. On the other hand, given the mix of theories, concepts, and causes, the level of depth is not high enough to learn new things, i.e., apparently this article does not propose any contribution.

Competing Interests: No competing interests were disclosed.

I confirm that I have read this submission and believe that I have an appropriate level of expertise to state that I do not consider it to be of an acceptable scientific standard, for reasons outlined above.

Reviewer Report 21 April 2023

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Jens Jørund Tyssedal
Department of Political Science, Aarhus University, Aarhus, Denmark

I recognize the efforts the author has made in response to the reports on the first version. Many of the main errors pointed out in my previous report have been corrected. However, some remain, and some new and significant errors have crept in through the revisions. More importantly, as I emphasized at the end of my previous report, that report only summarized what I took to be the main errors, as the article also contained minor errors beyond what I could list in the report. Simply correcting the errors described in the report would not be enough for a successful revision. Moreover, as I also emphasized, a successful revision would have required the author to study the political philosophers cited carefully. I regret to say that the article as it stands still presents their views, and connections between them, at a quite superficial level, and is still characterized by many errors, major and minor, in the presentation of the views it claims to present.

The new version also has a second, major problem, namely that it is hard to see what motivates the article in the current form. The author has done well in removing the claim that there is a general debate or disagreement between political philosophers and economists about what inequality is. However, as it stands, the article effectively amounts to two surveys next to each other. It is unclear what, if any connection there is between them, and what interest there may be in putting these two surveys into one and the same article. There is a comment in the conclusion about the paper showing that 'economists and political philosophers study different aspects of equality', which is a very uninformative conclusion, and only feeds the feeling that the article in its current form is without an overall purpose.

For these reasons, I find the article is not suitable for indexing. Considering the form it now has after revisions, I regret to say that it is also my sense that a successful revision of this article will be a hopeless project, and that the best advice I can give to the author at this point is to abandon it.

In light of the above, I will at this point only give a brief list of some of the main errors that characterize the survey of the views of political philosophers in the first part of the article. The list is meant to be indicative of the general problem of inaccurate presentation of views surveyed that characterizes the article, and is not a detailed or complete list.

The presentation of Utilitarianism is unclear, and although it may belong in a survey of this kind, its relevance to the discussion over equality is not well explained. Criticisms of Utilitarianism are not well presented, and the paper presents criticisms of welfarism as criticisms of utilitarianism. In table 1, the column 'Connection to Other Theories/Critique' contains many errors. Nozick's theory is inaptly labelled. Rawls, who rejects welfarism, is presented as relying on measurements of 'social welfare'. The presentation of Dworkin lacks page numbers and is unclear, and does not

really explain the idea of hypothetical insurance, only mentions it and its possible effects. The presentation of Cohen's view contains several errors. Sen's view of inequality is not presented well. I do not think the criticisms of the capability approach make much sense, nor is it clear to me whether they are supposed to be the author's own, or drawn from the literature. The presentation of Nozick's view contains several errors. Finally, the paper often fails to explain how many of these views have been developed in response to and in dialogue with each other. Similarly, I often miss an explanation of what, if anything, beyond being about equality, connects the views from economics surveyed in the second part of the paper. Both surveys read like lists of views that are about equality in some way, but it is unclear how the views are connected, and what, if anything, we might get from surveying them together.

Competing Interests: No competing interests were disclosed.

Reviewer Expertise: Theories of distributive justice in political philosophy

I confirm that I have read this submission and believe that I have an appropriate level of expertise to state that I do not consider it to be of an acceptable scientific standard, for reasons outlined above.

Version 1

Reviewer Report 26 January 2023

https://doi.org/10.21956/openreseurope.16144.r30626

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Juan Gabriel Rodriguez
[1] ICAE, EQUALITAS and CEDESOG, Universidad Complutense de Madrid, Madrid, Spain
[2] ICAE, EQUALITAS and CEDESOG, Universidad Complutense de Madrid, Madrid, Spain

This paper attempts to describe the alleged debate that exists between political philosophy and economics on *Distributive Justice*. To this end, it attempts to summarize in just 10 pages all the contributions made in both literatures.

Main comment:
My major concern with this article is that we are presented as one debate what are in fact two different things. One thing is the vision of distributive justice that political philosophers have had throughout history, and another very different thing is what are the main causes of economic inequality. On the one hand, philosophers, political scientists, sociologists, historians and economists have long discussed the concept of distributive justice. Thus, for example, utilitarianism is widely studied in economics, and the measurement of inequality of opportunity (in the sense of John Roemer) and capabilities (in the sense of Amartya Sen) are the subject of

countless articles in the economic literature. But this is one thing, and it is quite another to estimate the main causes of inequality (the interplay of supply and demand, technological change, globalization, institutions, redistributive policies, etc.). The title therefore does not reflect well the content of the article, which in a chained way describes the theories on distributive justice and then the possible causes of inequality. This is not a debate, and it is not true that political philosophy is normative and economics is positive. In fact, the whole proposal only reflects a very superficial view of what has been done and is being doing in economics.

Particular comments by sections:

"Introduction":

- Atkinson's (2019) reference is about poverty, not economic inequality.
- There is a lack of greater motivation for us to be interested in the topic. For example, are there new ideas proposed in political philosophy about distributive justice? Has the view in the literature changed dramatically? Are the causes of inequality now very different from before?
- It is said that "there is a striking disconnect between approaching the issue of inequality from different disciplines". However, Distributive Justice and Inequality are different concepts, so it is normal for their discussion to follow different paths. However, even if both were equivalent (which they are not), it is one thing to consider equality in any dimension that we can consider as the achievement of distributive justice and another thing to analyze the sources or causes of inequality. That is why the debate presented in this paper is not accurate.
- The fifth paragraph of the introduction is largely repeated at the end of the conclusions. More important is the fact that very vague quotations are made there. For example, in "...certain levels of inequality in a society might be tolerable,..." it should be said that sometimes inequality may not only be tolerable but also necessary (for example, as an economic incentive to effort when this is not observable), in "...which aims for the betterment of society -making everyone more equal." What dimension is the author referring to? Why does being all equal make a society better? We could all be equally poor and that would not make us better off. Is effort irrelevant?

"Political philosophers on equality (distributive justice)":

- The relationship or difference between consequentialism and welfarism is not clear.
- In Table 1, point 6 (capabilities), the part referring to Connection to Other Theories / Criticism is not well understood.
- What is the Difference Principle? This principle is not explained in the section. In addition, the paragraph where it is mentioned (last paragraph of the first column of page 5) is difficult to understand.
- When it says "While rawlsianism considers that behavior is attributed to effort and none to circumstance, utilitarianism posits and that all behavior is taken to be explained by circumstance and none by autonomous choice", I think it is the opposite.

"Economic inequality: an economics' perspective":

- The author does not comment on the supply and demand based theory called "The race between technology and education" by Tinbergen (1975[1]) and Goldin and Katz (2009[2]).
- It barely discusses the effect of technological progress on inequality. For example, the hypothesis of Routine Bias Technological Change (RBTC) and job polarization in more developed countries are not discussed.
- Kuznets' proposal originally dealt with the level of development, not economic growth. They are not the same thing.
- It is not true that for almost half a century Kuznets' hypothesis was not challenged by the literature and that it was only until Piketty's arrival that it was questioned. There are too many references on this subject to cite here, but the author should cite some of them and discuss their results.
- What does the sentence "Assuming that concentration of capital in the twentieth century was not massively dislocated, any further levelling would not be reversed by disqualifying forces." mean?
- What does "competitive versus noncompetitive equality of opportunity" mean?
- I do not think that Stiglitz takes a stance opposing the mainstream economic thought. In fact, he is an important representative of New Keynesian Economics. Does the author imply that mainstream economics is Monetarism or New Classic Macroeconomics? What is the mainstream economic thought?
- The description of Debraj Ray's proposal is quite confusing. It says that "functional rather than personal distribution of income is the key to understand how people earn income" but later one can read that "The main success of this theory is that it realizes that the measurement unit at the core of the economic inequality problem is household or individual,...". What is the key of this theory, the functional or the individual distribution of income?
- Although they are related, economic insecurity is a different concept from inequality, so it is not clear why it is being discussed here. The same goes for the concept of income polarization.
- On income polarization: The main difference between this concept and income inequality (compliance with the principle of progressive transfers within groups) is not discussed.
- See Rodriguez and Salas (2014[3]) for a connection between the Gini coefficient, median voter and welfare.
- Quintile income shares are not measures of inequality, as they do not comply with the most fundamental axiom of inequality: the principle of progressivity.

"Conclusions":
- Why are the "difference principle" and the "maximin criterion" competing principles? Moreover, are policies of redistribution the only way to maximize the share of primary goods of the least advantaged?

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Is the topic of the review discussed comprehensively in the context of the current literature?
Partly

Are all factual statements correct and adequately supported by citations?
Partly

Is the review written in accessible language?
Partly

Are the conclusions drawn appropriate in the context of the current research literature?
Partly

Competing Interests: No competing interests were disclosed.

Reviewer Expertise: Economics. In particular, inequality, welfare, polarization, inequality of opportunity and economic growth.

I confirm that I have read this submission and believe that I have an appropriate level of expertise to state that I do not consider it to be of an acceptable scientific standard, for reasons outlined above.

Author Response 26 Mar 2023

Denis Ivanov

-Author: First of all, I would like to express my gratitude to the two reviewers for the time and effort to examine the manuscript. Proposed suggestions significantly improved the article in many respects—most importantly, the implemented revisions strengthened the framing of the review, the structure, the interpretation and presentation of the literatures. These improvements would be impossible without your suggestions, and I feel that the peer-review worked as it should. I would like to kindly accept your invitation to revise and resubmit the paper and carry on with the peer-review process as you propose. The text bellow summarizes the revisions in a point-by-point way following the suggestions

proposed in the order of the reviewers. The feedback and your directions were exceptionally clear and; therefore, I was able to directly respond to each suggestion. All substantive comments made by reviewers are copy-pasted below (in *italics*) from the review report in the same sequence as they appeared in the decision letter. My responses are inserted after every point and are marked off by indentation and start with the capital letter A. For the sake of transparency, revised parts of the manuscript (in the manuscript files) are indicated using the track changes function in Word.

Juan Gabriel Rodriguez Reviewer 2 *This paper attempts to describe the alleged debate that exists between political philosophy and economics on Distributive Justice. To this end, it attempts to summarize in just 10 pages all the contributions made in both literatures.*

Main comment:
My major concern with this article is that we are presented as one debate what are in fact two different things. One thing is the vision of distributive justice that political philosophers have had throughout history, and another very different thing is what are the main causes of economic inequality. On the one hand, philosophers, political scientists, sociologists, historians and economists have long discussed the concept of distributive justice. Thus, for example, utilitarianism is widely studied in economics, and the measurement of inequality of opportunity (in the sense of John Roemer) and capabilities (in the sense of Amartya Sen) are the subject of countless articles in the economic literature. But this is one thing, and it is quite another to estimate the main causes of inequality (the interplay of supply and demand, technological change, globalization, institutions, redistributive policies, etc.). The title therefore does not reflect well the content of the article, which in a chained way describes the theories on distributive justice and then the possible causes of inequality. This is not a debate, and it is not true that political philosophy is normative and economics is positive. In fact, the whole proposal only reflects a very superficial view of what has been done and is being doing in economics.

Particular comments by sections:

"Introduction":

- *R2: Atkinson's (2019) reference is about poverty, not economic inequality.*

-A: Thank you for this observation, this has now been deleted.

- *R2:There is a lack of greater motivation for us to be interested in the topic. For example, are there new ideas proposed in political philosophy about distributive justice? Has the view in the literature changed dramatically? Are the causes of inequality now very different from before?*

- A: Thank you for this useful observation. I have rewritten the first paragraph of the introduction as below: The academic literature on inequality, including its causes (Gornick & Jäntti, 2014), consequences (Blank, 2011; Chauvel & Schröder, 2015; Clark et al., 2008; Hertel-Fernandez, 2019; Pickett & Wilksinson, 2015; Stiglitz, 2012; Western, 2006) and measurement innovations (Atkinson, 2019), is rapidly expanding. New works are multidisciplinary - often borrowing concepts from philosophy (Brunori & Neidhöfer, 2021), sociology (Corak, 2004; Corak, 2013) and other disciplines (Krieger, 2016). However, despite the abundance of new empirical work on various aspects of inequality, there is often a

disregard for the careful usage of concepts according to the contexts of the debates of their own disciplines. This necessitates a step back and a careful reassessment of the main debates and history of ideas on inequality.

- *R2: It is said that "there is a striking disconnect between approaching the issue of inequality from different disciplines". However, Distributive Justice and Inequality are different concepts, so it is normal for their discussion to follow different paths. However, even if both were equivalent (which they are not), it is one thing to consider equality in any dimension that we can consider as the achievement of distributive justice and another thing to analyze the sources or causes of inequality. That is why the debate presented in this paper is not accurate.*

-A: Thank you for the observation, I have rewritten the introduction, as well as have reframed the title and the text throughout to present it more of a parallel development in the literature than the debate between disciplines.

- *R2: The fifth paragraph of the introduction is largely repeated at the end of the conclusions. More important is the fact that very vague quotations are made there. For example, in "...certain levels of inequality in a society might be tolerable,..." it should be said that sometimes inequality may not only be tolerable but also necessary (for example, as an economic incentive to effort when this is not observable), in "...which aims for the betterment of society -making everyone more equal." What dimension is the author referring to? Why does being all equal make a society better? We could all be equally poor and that would not make us better off. Is effort irrelevant?*

-A: Thank you for this important observation. I have re-visited the literature and have also rewritten the rest of the introduction as per below: This study provides a review of developments in the literature from political philosophers and economists by examining the historical evolution of perspectives on economic inequality and distributive justice. It serves as a starting point for students and new learners of socioeconomic inequality from an interdisciplinary perspective. In addition, it also focuses on the causes of inequality, which has been a major part of how economists have approached economic inequality. This review emphasizes that distributive justice and inequality are separate concepts with separate discussions. Political philosophers debate distributive justice along multiple axes, including utilitarian and egalitarian perspectives, as well as theories of ex ante inequality of opportunity and capabilities. Other key points of disagreement include the grounds for distribution and the distributive principle between theorists of distributive justice and libertarians. In contrast, economists focus on issues such as measurement, the existence of an efficiency/inequality trade-off, the endogeneity of inequality, and the main causes of it. While political philosophers like Rawls have influenced economics, and economist-philosophers like Sen and Roemer have effectively bridged the divide between the two disciplines, there is limited communication between them. Economic theories tend to be utilitarian and positive (as opposed to normative), while political philosophy theories are mostly normative and concerned with fairness. This review is organized as follows. The first section presents the evolution of the debate on distributive inequality from the perspective of political philosophy. The subsequent section introduces the debate on economic inequality from the perspective of economists. The final section discusses the results and provides a conclusion.

"Political philosophers on equality (distributive justice)":

- *R2: The relationship or difference between consequentialism and welfarism is not clear.*

-A: Thank you for this comment. This was raised by the second reviewer as well, I have now deleted the mention of it.

- *R2: In Table 1, point 6 (capabilities), the part referring to Connection to Other Theories / Criticism is not well understood.*

-A: Thank you for this point. I have rewritten the Connection to Other Theories / Criticism to the following: Criticism by Roemer (1998a): the connection between primary goods and the achievement of life plans that produce happiness is not always due to capabilities. Criticism by Bourguignon (2017): capabilities are a normative concept
to define poverty, rather than inequality

- *R2: What is the Difference Principle? This principle is not explained in the section. In addition, the paragraph where it is mentioned (last paragraph of the first column of page 5) is difficult to understand.*

-A: Thank you for this question. The Difference Principle is the second part of the second principle of John Rawls's theory of justice, which holds that inequalities in the distribution of these goods are permissible only if they benefit the least well-off positions of society. I have added a paragraph about it in the text.

- *R2: When it says "While rawlsianism considers that behavior is attributed to effort and none to circumstance, utilitarianism posits and that all behavior is taken to be explained by circumstance and none by autonomous choice", I think it is the opposite.*

-A: Thank you for the comment. You are correct, this has now been reworded.

"Economic inequality: an economics' perspective":

- *R2: The author does not comment on the supply and demand based theory called "The race between technology and education" by Tinbergen (1975[1]) and Goldin and Katz (2009[2]).*

-A: Thank you for this useful suggestion. I have now added a paragraph about it in the text (also added to the table 2): Economic inequality has also been tackled from the perspective of supply and demand. First proposed by Tinbergen (1975) and later developed by Goldin and Katz (2009), "the race between technology and education" theory sees income distribution as the distribution of prices of the factors of production. The supply is described by the number of people in the labor force with a different number of years of education. Demand is differentiated according to quality (number of years of schooling) and prices (wages) in the main sectors of production: agriculture, manufacturing, trade and transport, and other services. The measure of dispersion or by deciles (in particular, the highest) expressed in terms of the median is later applied to calculate the level of inequality. Further developments in the literature pointed to the growing role of institutional factors (Freeman and Katz, 1994; Katz and Autor, 1999) - changes in unionization, minimum wages, and labor codes. Wolfson (1979) provides criticism to the theory that it undermines the role of the tax structure design, that is, determined by public choice and ultimately a determinant of the political process. In addition, what seems to be missing from the theory is the level of acceptable level of inequality that is tolerable in a society without major societal grievances.

- *R2: It barely discusses the effect of technological progress on inequality. For example, the hypothesis of Routine Bias Technological Change (RBTC) and job polarization in more developed countries are not discussed.*

-A: Thank you for the suggestion. I have added three paragraphs about it in the text (also added to the table 2): Another theory on the rise of inequality focuses on the effect of

technological progress. The essence of the hypothesis of 'Skill-Biased Technological Change' (SBTC) (Katz and Autor, 1999; Goldin and Katz, 2008; 2009; Acemoglu and Autor, 2011) is that the increase in inequality is caused by the shift in demand in favor of more educated workers. Since technological change favors replacing labor in routine tasks due to robotization (routine-biased technological change), it decreases the demand for middling relative to high-skilled and low-skilled occupations. Job polarization within and between industries has been documented as the main consequences of it in most advanced economies (Goos et al., 2014). Addressing the criticism of the above-mentioned theory, Goldin and Katz (2008) provided evidence of a key moderating variable that slows the emergence of inequality. Looking back at the two previous centuries, they provide evidence that educational progress is the key missing link between technological change and inequality. Focusing on the example of the United States, they claim that throughout its history, when economic inequality has been at its lowest, the American educational system has been built on the principles of egalitarianism. However, the post-1980 increase in within-country inequality is amplified by a slow down in the educational attainment of those at the bottom of income distribution, particularly for racial and ethnic minorities. Recent studies have also found that rapid technological change increases economic inequality beyond the most developed economies (Lee and Wie, 2015; Pi and Zhang, 2018). Advancing technology seems to produce an increase in the relative demand for skilled and educated workers that cascades down to generations, boosting intergenerational human capital mobility in the long run (Gradstein et al., 2005). Although job polarization is currently observed in some European and advanced economies (Kharlamova et al., 2018), the result of technological factors as a key determinant of inequality dynamics on the global scale, crossing into the Global South seems to be a global phenomenon.

- *R2: Kuznets' proposal originally dealt with the level of development, not economic growth. They are not the same thing.*

-A: Thank you for this point, I have made corrections in the text

- *R2: It is not true that for almost half a century Kuznets' hypothesis was not challenged by the literature and that it was only until Piketty's arrival that it was questioned. There are too many references on this subject to cite here, but the author should cite some of them and discuss their results.*

-A: Thank you for this point, I have added a paragraph about it: Kuznets' waves/cycles have faced empirical challenges over time. For instance, Huang et al. (2012) use new data to show a U-shaped (not an inverted U-shaped) relationship between inequality and development in the US. Furthermore, the hypothesis of Kuznets has limited external validity in different historical and geographical contexts, especially for developing countries that differ from the industrialized countries that Kuznets studied. Kuznets curves have also been applied to the development of institutions (Martinez-Navarro et al., 2022), and pollution (Balsalobre-Lorente et al., 2022), which found inverted U-shaped distribution as well.

- *R2: What does the sentence "Assuming that concentration of capital in the twentieth century was not massively dislocated, any further levelling would not be reversed by disqualifying forces." mean?*

-A: Thanks for pointing this out. It means: If capital was not unevenly distributed in the 1900s, nothing would make it more unequal later. I have decided to delete this sentence for a better flow of the paragraph

- *R2: What does "competitive versus noncompetitive equality of opportunity" mean?*

-A: Competitive equality of opportunity means that people should have equal access to compete for scarce or desirable positions or resources, such as jobs, education, or income. Noncompetitive equality of opportunity means that people should have equal access to basic goods or services that are necessary for human dignity and well-being, such as health care, housing, or food. The difference is made in Atkinson (2015), but also argued in more detailed in Gomberg, P. (2007). *How to make opportunity equal: Race and contributive justice*. John Wiley & Sons. I have added a clarification in a footnote.

- *R2: I do not think that Stiglitz takes a stance opposing the mainstream economic thought. In fact, he is an important representative of New Keynesian Economics. Does the author imply that mainstream economics is Monetarism or New Classic Macroeconomics? What is the mainstream economic thought?*

-A: Thank you for pointing this out. I have omitted this mention from the text. In general, I believe that Keynesian economics, New Keynesian economics, New Classic Macroeconomics and other approaches besides Monetarism belong to the category, the categorization of which is arguably very vague.

- *R2: The description of Debraj Ray's proposal is quite confusing. It says that "functional rather than personal distribution of income is the key to understand how people earn income" but later one can read that "The main success of this theory is that it realizes that the measurement unit at the core of the economic inequality problem is household or individual,...". What is the key of this theory, the functional or the individual distribution of income?*

-A: Great comment. The key of this theory is the functional aspect, I have made corrections in this regard.

- *R2: Although they are related, economic insecurity is a different concept from inequality, so it is not clear why it is being discussed here. The same goes for the concept of income polarization.*

-A: Thanks for pointing this out. After a careful consideration, I have decided to drop both concepts from the review.

- *R2: On income polarization: The main difference between this concept and income inequality (compliance with the principle of progressive transfers within groups) is not discussed.*

-A: Thanks for pointing this out. After a careful consideration, I have decided to drop both concepts from the review

- *R2: See Rodriguez and Salas (2014[3]) for a connection between the Gini coefficient, median voter and welfare.*

-A: Thank you for this reference. I have integrated it in the respective section with the mention of the median voter.

- *R2: Quintile income shares are not measures of inequality, as they do not comply with the most fundamental axiom of inequality: the principle of progressivity.*

-A: This is a very important point. Income polarization that uses the quintile income shares

measures has been omitted from the review.
"Conclusions":

- *R2: Why are the "difference principle" and the "maximin criterion" competing principles? Moreover, are policies of redistribution the only way to maximize the share of primary goods of the least advantaged?*

-A: Thank you for the comment, as you have pointed out the two are not competing, but complementary instead. As advised by the other reviewer as well, I have gone into a different direction with the conclusions. Here are the rewritten conclusions: This study provides a historical review of the parallel development of literature on distributive justice and inequality from the perspectives of political philosophers and economists. Debates among political philosophers, which originated in the 17th century, have primarily focused on conditions for redistribution, the definition of justice, and how to make society more just. These debates have evolved from discussions between egalitarians and utilitarians to modern theories of capabilities and inequality of opportunity. Ultimately, distributive justice is a normative term that describes what justice requires in terms of distribution within a society, with equality being one possible answer to that question. The second part of this review examines the economic perspective on inequality, including its definition, measurement, and causes. It explores theories ranging from Malthusian cycles to global inequality, as well as functional and institutional aspects. Economic inequality is mostly linked to the measurement of socioeconomic conditions at a specific point in time (although initial conditions or future income may also be considered), and often does not include considerations of fairness or institutional guarantees of liberty, equal opportunity, or fair distribution. This review shows that economists and political philosophers study different aspects of equality. For instance, there is no meaningful disagreement between Scheidel's theory of the 'Four Horsemen of Leveling' and Rawls' Theory of Justice, as these theories address different subjects: the causes of leveling and the characteristics of a just society, respectively. However, it is important to note that not all philosophers agree that equality is the goal, as documented in this review, and hence it cannot be assumed that all philosophers and economists share this view.

Competing Interests: No competing interests were disclosed.

Reviewer Report 26 January 2023

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Jens Jørund Tyssedal
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The article reviews literature on different views on inequality in two disciplines, political

philosophy and economics. It concludes by pointing to some differences between how inequality is discussed in these literatures, and a suggestion that the difference may not be as fundamental as some may think.

I work on political philosophy and the topic of distributive justice specifically, and this is where my competence lies. In my review, I therefore focus on the first part of the article, the review of positions in political philosophy, and the conclusion at the end. I will have little to say about the second part, which reviews positions from economics. This part of the article should be reviewed by someone more competent in economics than I am.

I appreciate that in undertaking to conduct this review article, the author has taken on a daunting and difficult task. The literature on inequality and distributive justice in political philosophy is huge and complex, and so too is the literature on inequality in economics. I appreciate that the author is willing to attempt such an ambitious project, and regret to say that it is my overall assessment that the article contains too many errors to be acceptable for indexing, at least in the part reviewing views from political philosophy. The author may be able to improve the article, taking the comments below into account, and studying the views of many of the philosophers cited in the review more carefully. However, the amount of errors in the article is so significant that I find the article is not acceptable for indexing in its current form.

The article would also benefit greatly from proofreading from a native English speaker. There are several places where the presentation is unclear, leaving me unsure what the author intends, and whether the presentation is correct or not.

Detailed comments on the main errors in the article below, in chronological order:

Abstract:

- ‘egalitarianists’ (sic.). The going term in political philosophy would be ‘egalitarians’, this should also be corrected elsewhere.

Introduction:

- I think it is not correct to present the political philosophy literature as primarily an argument between utilitarians and egalitarians. This is only one disagreement. No support is offered for the claim that it is the main axis of disagreement. Other important axes of disagreements are for example between theorists of distributive justice of all kinds, and libertarians, or on what it is that should be distributed, or what the distributive principle should be.

- I also disagree with the claim that the disciplines rarely communicate. Also here, no documentaion is provided. I agree that they could communicate more and better. But political philosophers such as Rawls arguably have had some influence also in economics, and many political philosophers are generally interested in economics, when they can understand it. Moreover, several economist-philosophers have effectively bridged the divide, such as Sen and Roemer, who the review cites, and others as well (e.g. Fleurbaey).

- The conclusion that theories of political philosophy are not suitable for cross-national research is debatable, I return to it below.

- Rawls' Difference Principle, presented as the principle of 'some of the political philosophers', is not very different from maximin, and certainly not the opposite, so here a false contrast between political philosophy and economics is drawn up which misrepresents the Difference Principle. The rest of this paragraph is unclear, and contains further errors, such as that Rawls' Difference Principle is about ex ante equality.

Political philosophers on equality (distributive justice):

- The author is right to point out that distributive justice has been a major topic in political philosophy since Plato. I do not quite understand what the author intends with the claim that most of the work has been completed in the 20th century, but I think this does not accurately present the state of the discipline. Rawls (1971) is certainly the most influential work in this literature, but distributive justice has been a significant topic ever since, i.e. from last third of the 20th century and ongoing, still generating a lively debate and a large number of publications.

Utilitarianism.

- I find it odd to introduce utilitarianism as 'the main philosophical idea which relates to the economic inequality'. What does the author mean by this? In itself, utilitarianism is about maximizing utility, not about equality at all.

- It is not clear to me how we start 'focusing on the inequality aspect of utilitarianism' once we consider two related notions, conseqentialism and welfarism. Welfarism is a view about what we should be interested in, whether we are maximizing or equalizing, not a theory of equality. I struggle to understand what the author intends with this paragraph. Moreover, I cannot see how the final sentence makes sense, i.e. how it could be right that welfarism without consequentialism is the egalitarian notion of distributive justice.

Table 1:

- Rawls' theory is inaptly named, fair equality of opportunity is only one element of this theory. Rawls' main thesis is also misrepresented, Rawls rejects welfare as metric of justice.

- Cohen (2008) 'Rescuing Justice and Equality' is miscited as (2009). However, Cohen's emphasis on 'Communal reciprocity' is mentioned, but this is rather a part of his view developed in Cohen (2009) 'Why not socialism', which the article does not cite. The purported connection to Rawls is described unclearly, I cannot tell if it is correct, or incorrect.

Egalitarianism:

- The core of Rawls' Theory of Justice is the two principles of justice cited here. Rawls does not have four central principles.

- I do not know what the author intends when writing that 'inequality in Rawls (...) is tied to the principles of uiversal liberty', but this does not look like an accurate rendering of Rawls' view. Rawls is concerned with inequalities in basic liberties, and in the primary goods. This has been a part of his view since 1971, nothing changes in this regard in 1985, as the article may be read as suggesting.

- It is also strange to say that the primary goods are a 'firm base' for comparisons, when one

of the challenges for Rawls view (that Rawls recongizes) is how to compare the situations of individuals who are unequal in different primary goods. Finally, Rawls is not a welfarist, he explicitly rejects welfare as metric of justice.

- Dworkin's 'Equality of Resources' view is much more complex than what the author presents here, and what the author presents is inaccurate. The author is right that one of Dworkin's main contributions was incorporating a notion of responsibility in theories of distributive justice. But his view of distributive justice is ultimately that this is a matter of 'hypthetical insurance', which is Dworkin's somewhat complicated view on how it may be possible to realize ex ante equality.

- The author is right that Cohen is the great egalitarian critic of Rawls, but misrepresents Cohen's view and criticism. It is Rawls who allows incentives, not Cohen. Cohen criticizes incentives. Moreover, there is a large debate on who is right, Cohen or Rawls, focusing on different aspects of their theories. The question of whether Cohen's theory is equally apt as Rawls' theory for a pluralist society does not strike me as the most important of these, so it is strange to present this as the central objection, in my opinion. An arguably more fundamental difference is that their views on what justice is are fundamentally different (Cohen 2008, chaps. 6 and 7).

- Page number for Nozick's principles of entitlement is lacking. It is also strange to group Nozick among the egalitarians. I think it is more common to consider him the great libertarian critic of egalitarian theories of distributive justice.

Capabilities approach:

- To me it seems unnatural to present Sen as a contrast to the egalitarians. For on the author's presentation, Sen's view of justice is that this requires that 'capabilities are equalized…'. The egalitarians the author cites in the section on egalitarians disagree on the principle of distributive justice (Difference Principle, Ex ante equality) and on what should be distributed according to this principle (primary goods, resources, 'advantage'). Sen's view can be seen as one more view on what should be distributed, namely capabilities.

A Reconciliatory Theory?

- Again, Roemer may belong more naturally with the egalitarians, than as an alternative to them. Moreover, several claims in this section are incorrect. The distinction between effort and circumstance is not central to Rawls. Utilitarians need not have a view on what part of behaviour is choice or circumstance. Page numbers are lacking in this section, making it hard to check the author's claims. It is not clear exactly why the author thinks Roemer is a reconciliation between all three of capability theory, utilitarianism and egalitarianism.

- As economic theory lies outside my area of expertise, I do not have much to say about the part of the paper starting from 'Economic inequality: an economics' perspective'; it would be good if this part receive feedback from another reviewer.

Conclusion:

- The author is right that political philosophy theories on distributive justice are normative, and deal with normative concepts and concerns such as fairness. However, I find the author's claim that this makes them not suitable for cross-national and time-variant

research debatable. It requires discussion and more backing, if the author wants to affirm this. Many political philosophers will disagree, and be of the opinion that answering questions such as whether a society is becoming more or less just over time is exactly what their theories should help with. Admittedly, it would take a fair amount of work to operationalize how this could be done, as we have no access to e.g. different individuals' welfare, and some primary goods and capabilities may be hard to measure. Thus, I agree that one may debate whether these theories really are suitable for cross-national or time-variant research. But in my opintion it is not reasonable to make this controversial claim without more backing.

- The author suggests that 'most political philosophers use distributive justice as the closest term to equality'. This is incorrect. Indeed, this review presents the views of philosophers who have different views on whether distributive justice requires equality or permits inequalities, and if so, which. Thus, 'distributive justice' is not a term that means almost the same thing as equality. Distributive justice is a normative term for what justice requires of distribution in a society, and equality is one possible answer to that question. Other distributive justice theorists in political philosophy will for example say that distributive justice requires that everyone has enough, but that it has nothing to do with equality at all (this view is however not discussed in this article).

- Finally, the paper seems to end by suggesting a reconciliatory note, suggesting that economics and political philosophy agree that equality is the goal, and that the disagreement only concerns 'the tools, the need and the weight of different aspects of the problem of inequality'. I do not think this suggestion follows from the review, and I also think it is false. It is not clear that there is a disagreement between economists and political philosophers in the first place, nor do I think the main body of the review suggests that there is one. Rather, I think the review documents that economists and political philosophers are studying different aspects of equality. For example, there is no meaningful sense in which there is a disagreement between Scheidel's theory of the 'Four Horsemen of leveling' and Rawls' Theory of Justice. These are just theories about different things: about what tends to cause levelling, and what characterizes a just society, respectively. Finally, to reiterate, it is not the case that all philosophers agree that equality is the goal – the review also documents this – hence it cannot be the case that all philosophers and economists agree on this.

Above I have summarized what I take to be the main errors in the presentation of views from political philosophy in the article. There are also minor errors and unclarities beyond what I can list here. I encourage the author to study the political philosophers cited in the article carefully and revise the article thoroughly if they want to pursue it further.

Is the topic of the review discussed comprehensively in the context of the current literature?

Yes

Are all factual statements correct and adequately supported by citations?

Partly

Is the review written in accessible language?

Partly

Are the conclusions drawn appropriate in the context of the current research literature?
No

Competing Interests: No competing interests were disclosed.

Reviewer Expertise: Theories of distributive justice in political philosophy

I confirm that I have read this submission and believe that I have an appropriate level of expertise to state that I do not consider it to be of an acceptable scientific standard, for reasons outlined above.

Author Response 26 Mar 2023

Denis Ivanov

-Author: First of all, I would like to express my gratitude to the two reviewers for the time and effort to examine the manuscript. Proposed suggestions significantly improved the article in many respects—most importantly, the implemented revisions strengthened the framing of the review, the structure, the interpretation and presentation of the literatures. These improvements would be impossible without your suggestions, and I feel that the peer-review worked as it should. I would like to kindly accept your invitation to revise and resubmit the paper and carry on with the peer-review process as you propose. The text bellow summarizes the revisions in a point-by-point way following the suggestions proposed in the order of the reviewers. The feedback and your directions were exceptionally clear and; therefore, I was able to directly respond to each suggestion. All substantive comments made by reviewers are copy-pasted below (in *italics*) from the review report in the same sequence as they appeared in the decision letter. My responses are inserted after every point and are marked off by indentation and start with the capital letter A. For the sake of transparency, revised parts of the manuscript (in the manuscript files) are indicated using the track changes function in Word.

Jens Jørund Tyssedal*, Department of Political Science, Aarhus University, Aarhus, Denmark The article reviews literature on different views on inequality in two disciplines, political philosophy and economics. It concludes by pointing to some differences between how inequality is discussed in these literatures, and a suggestion that the difference may not be as fundamental as some may think.*

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willing to attempt such an ambitious project, and regret to say that it is my overall assessment that the article contains too many errors to be acceptable for indexing, at least in the part reviewing views from political philosophy. The author may be able to improve the article, taking the comments below into account, and studying the views of many of the philosophers cited in the review more carefully. However, the amount of errors in the article is so significant that I find the article is not acceptable for indexing in its current form.

The article would also benefit greatly from proofreading from a native English speaker. There are several places where the presentation is unclear, leaving me unsure what the author intends, and whether the presentation is correct or not.

Detailed comments on the main errors in the article below, in chronological order:

Abstract:

- *R1: 'egalitarianists' (sic.). The going term in political philosophy would be 'egalitarians', this should also be corrected elsewhere.*

-A: Thank you for pointing this error out, this is now corrected throughout the review.

Introduction:

- *R1: I think it is not correct to present the political philosophy literature as primarily an argument between utilitarians and egalitarians. This is only one disagreement. No support is offered for the claim that it is the main axis of disagreement. Other important axes of disagreements are for example between theorists of distributive justice of all kinds, and libertarians, or on what it is that should be distributed, or what the distributive principle should be.*

-A: Thank you for this comment, I have borrowed some of the wording from your suggestion to modify the text: This review emphasizes that distributive justice and inequality are separate concepts with separate discussions. Political philosophers debate distributive justice along multiple axes, including utilitarian and egalitarian perspectives, as well as theories of ex ante inequality of opportunity and capabilities. Other key points of disagreement include the grounds for distribution and the distributive principle between theorists of distributive justice and libertarians. In contrast, economists focus on issues such as measurement, the existence of an efficiency/inequality trade-off, the endogeneity of inequality, and the main causes of it..

- *R1: I also disagree with the claim that the disciplines rarely communicate. Also here, no documentaion is provided. I agree that they could communicate more and better. But political philosophers such as Rawls arguably have had some influence also in economics, and many political philosophers are generally interested in economics, when they can understand it. Moreover, several economist-philosophers have effectively bridged the divide, such as Sen and Roemer, who the review cites, and others as well (e.g. Fleurbaey).*

-A: Thank you for this useful comment, I have rewritten another paragraph in the introduction: While political philosophers like Rawls have influenced economics, and economist-philosophers like Sen and Roemer have effectively bridged the divide between the two disciplines, there is limited communication between them. Economic theories tend to be utilitarian and positive (as opposed to normative), while political philosophy theories are mostly normative and concerned with fairness.

- *R1: The conclusion that theories of political philosophy are not suitable for cross-national research is debatable, I return to it below.*

-A: I have deleted this mention, as the review does not provide substantial evidence for this claim.

- *R1: Rawls' Difference Principle, presented as the principle of 'some of the political philosophers', is not very different from maximin, and certainly not the opposite, so here a false contrast between political philosophy and economics is drawn up which misrepresents the Difference Principle. The rest of this paragraph is unclear, and contains further errors, such as that Rawls' Difference Principle is about ex ante equality.*

-A: This has also been raised by the second reviewer, I have decided to delete the mention of it in the text.

Political philosophers on equality (distributive justice):

- *R1: The author is right to point out that distributive justice has been a major topic in political philosophy since Plato. I do not quite understand what the author intends with the claim that most of the work has been completed in the 20th century, but I think this does not accurately present the state of the discipline. Rawls (1971) is certainly the most influential work in this literature, but distributive justice has been a significant topic ever since, i.e. from last third of the 20th century and ongoing, still generating a lively debate and a large number of publications.*

-A: Thank you for your comment. Here is the revised version: Distributive justice has been a major topic in political philosophy since Plato, with earlier works by Aristotle, John Locke, Jeremy Bentham, and Karl Marx all referring to it throughout time. While Rawls' (1971) work is certainly the most influential in this literature, distributive justice has continued to be a significant topic ever since, generating a lively debate and a large number of publications from the last third of the 20th century and ongoing. Modern political philosophers have picked up where their antecedents left off, drawing influences that are hard to trace exactly. Table 1 presents a comprehensive overview of the main theories of inequality of political philosophy.

Utilitarianism.

- *R1: I find it odd to introduce utilitarianism as 'the main philosophical idea which relates to the economic inequality'. What does the author mean by this? In itself, utilitarianism is about maximizing utility, not about equality at all.*

-A: Thank you for this observation. I have rewritten the paragraph to the following: Utilitarianism, represented by 19th-century philosophers such as John Stuart Mill, Henry Sidgwick, and Jeremy Bentham, is one philosophical idea that relates to economic inequality. While paraphrasing Bentham's (1996) definition of utility in the late 17th (edited in the early 18th century), it is a property of something to produce benefit, advantage, pleasure, good, or happiness, or to prevent losses for the happiness of a community (or an individual) (p.6). Following the logic of the greatest happiness for the greatest number, utilitarianism focuses on maximizing utility rather than equality. Happiness or utility can be quantified using the arithmetical difference between those who are better off and those who are worse off. As a result of the calculations, an average amount of happiness of the whole population is computed (average utilitarianism). Alternatively, the total amount of happiness of a particular population is the sum of the individual happiness of each member (total utilitarianism). Evidently, utilitarian theory raises multiple questions of moral ground. The criticism over the utility calculus (Adams, 1976), the debate whether happiness of the

worse off should be maximized (or struggles minimized) (Popper, 1945), and whether actions should be chosen based on their likely results are all important pieces of ethical theory (Brandt & Hooker, 1994).

- *R1: It is not clear to me how we start 'focusing on the inequality aspect of utilitarianism' once we consider two related notions, conseqentialism and welfarism. Welfarism is a view about what we should be interested in, whether we are maximizing or equalizing, not a theory of equality. I struggle to understand what the author intends with this paragraph. Moreover, I cannot see how the final sentence makes sense, i.e. how it could be right that welfarism without consequentialism is the egalitarian notion of distributive justice.*

-A: Thank you for this note, I have decided to delete this paragraph in the revised version.

Table 1:

- *R1: Rawls' theory is inaptly named, fair equality of opportunity is only one element of this theory. Rawls' main thesis is also misrepresented, Rawls rejects welfare as metric of justice.*

-A: Thank you for this note, I have modified it to the following in the Table 1: 2 Theory of Justice as Fairness John Rawls (1971) Egalitarianism/
Liberalism rejects welfare as metric of justice, proposes two principles to ensure the greatest possible amount of liberty and equality for society Criticizes utilitarianism on the principle of *universal*liberty
and moral pluralism

- *R1: Cohen (2008) 'Rescuing Justice and Equality' is miscited as (2009). However, Cohen's emphasis on 'Communal reciprocity' is mentioned, but this is rather a part of his view developed in Cohen (2009) 'Why not socialism', which the article does not cite. The purported connection to Rawls is described unclearly, I cannot tell if it is correct, or incorrect.*

-A: Thank you for this observation. I have modified the row in the Table 1, per the comment to the following: 4 Justice and equality (Cohen (1989);
Cohen (2008)) Egalitarianism/
Liberalism Justice requires equality. Ideal
society to be characterized
by communal reciprocity.
Although equality is a
baseline, self-interest can
be pursued to a reasonable
extent, freedom of
occupational choice Criticizes Rawls: difference principle permits inequalities that reflect the relative scarcity of different skills and natural abilities; individuals should cultivate an egalitarian ethos instead (Moon, 2015)

Egalitarianism:

- *R1: The core of Rawls' Theory of Justice is the two principles of justice cited here. Rawls does not have four central principles.*

-A: Great observation, this has been modified.

- *R1: I do not know what the author intends when writing that 'inequality in Rawls (...) is tied to the principles of uiversal liberty', but this does not look like an accurate rendering of Rawls' view. Rawls is concerned with inequalities in basic liberties, and in the primary goods. This has been a part of his view since 1971, nothing changes in this regard in 1985, as the article*

may be read as suggesting.

-A: the paragraph has been modified to the following: In Rawls' theoretical framework, inequality is tied to the principles of universal liberty. He presents his theory as 'justice as fairness' and considers certain primary social goods that a person is entitled to for a fair existence, regardless of its conception of the good. However, one challenge for Rawls' view is how to compare the situations of people who are unequal in different primary goods. To address this issue, Rawls measures the social welfare of society based on the welfare of the least well-off individual member of society, appealing to moral pluralism rather than welfarism.

- *R1: It is also strange to say that the primary goods are a 'firm base' for comparisons, when one of the challenges for Rawls view (that Rawls recongizes) is how to compare the situations of individuals who are unequal in different primary goods. Finally, Rawls is not a welfarist, he explicitly rejects welfare as metric of justice.*

-A: the paragraph has been modified to the following: In Rawls' theoretical framework, inequality is tied to the principles of universal liberty. He presents his theory as 'justice as fairness' and considers certain primary social goods that a person is entitled to for a fair existence, regardless of its conception of the good. However, one challenge for Rawls' view is how to compare the situations of people who are unequal in different primary goods. To address this issue, Rawls measures the social welfare of society based on the welfare of the least well-off individual member of society, appealing to moral pluralism rather than welfarism.

- *R1: Dworkin's 'Equality of Resources' view is much more complex than what the author presents here, and what the author presents is inaccurate. The author is right that one of Dworkin's main contributions was incorporating a notion of responsibility in theories of distributive justice. But his view of distributive justice is ultimately that this is a matter of 'hypthetical insurance', which is Dworkin's somewhat complicated view on how it may be possible to realize ex ante equality.*

-A: Thank you for this observation, I have revisited Dworkin's work and have rewritten the paragraph, as per the following: Dworkin (1981a) contends that individuals should be compensated only for circumstances beyond their control. While criticizing Rawls heavily, he incorporates responsibility into distributive justice theory and introduces the concept of equality of resources. Dworkin's view on distributive justice ultimately concerns 'hypothetical insurance' a means of compensating people who suffer misfortune in the distribution of internal resources such as disability, ill health or lack of marketable skills (Clayton, 2015). He believes that ex ante equality may be achievable through limited redistributive compensation for those who are less fortunate. In the view of Dworkin, the equality of resources does not necessarily refer to physical commodities, but rather to the instruments that people use to achieve success or achieve life goals. He envisions equal treatment of individuals in two dimensions: resources and welfare, with the former representing his true meaning of distributive justice.

- *R1: The author is right that Cohen is the great egalitarian critic of Rawls, but misrepresents Cohen's view and criticism. It is Rawls who allows incentives, not Cohen. Cohen criticizes incentives. Moreover, there is a large debate on who is right, Cohen or Rawls, focusing on different aspects of their theories. The question of whether Cohen's theory is equally apt as Rawls' theory for a pluralist society does not strike me as the most important of these, so it is*

strange to present this as the central objection, in my opinion. An arguably more fundamental difference is that their views on what justice is are fundamentally different (Cohen 2008, chaps. 6 and 7).

-A: Thank you for this very important point observations. I have returned and have reread both of these works and have come up with two paragraphs instead of one: Cohen (2008) critiques Rawls' difference principle at its core, claiming that it is insufficiently egalitarian. He criticizes Rawls' account of justice for permitting a relative scarcity of different skills and natural abilities (a topic that Smith, Ferguson, Marx, and Durkheim). Cohen (1989) provides a political justification for his view that equality must not only be established through institutional design but also be an imperative for individuals. Unlike Rawls, who allows incentives to encourage individuals to use their talents for mutual benefit, Cohen criticizes incentives. Instead of viewing the 'basic structure' as the main subject of justice, he argues that individual citizens should cultivate an egalitarian ethos (Moon 2015), allowing a just society to eliminate incentive payments as a means to encourage individuals to apply their talents in socially beneficial ways. A fundamental difference between Rawls' and Cohen's views on justice lies in their respective conceptions of what justice is. Rawls defends the concept of justice as fairness and believes that justice cannot be derived through utilitarianism. In contrast, Cohen argues against the Rawlsian version of a just society in his book "Rescuing Justice and Equality" (2008), demonstrating that distributive justice does not tolerate deep inequality. Cohen charges Rawls' constructivism with systematically conflating the concept of justice with other concepts, focusing on the lack of justification 'based on facts about our condition'. For Cohen, if principles respond to facts, then principles at the summit of our conviction are grounded in no facts whatsoever (Cohen, 2008, p.229). He criticizes Rawls' constructivism and his use of the original position to determine the nature of justice, stating that it mistakenly identifies fundamental principles of justice with optimal rules for social regulation (Cohen, 2008, p.337). For Cohen, separating justice from facts such as publicity considerations and rules formation desiderata brings it closer to equality (Moon, 2015).

- *R1: Page number for Nozick's principles of entitlement is lacking. It is also strange to group Nozick among the egalitarians. I think it is more common to consider him the great libertarian critic of egalitarian theories of distributive justice.*

- A: Thank you for this comment. I have added the page number as well as have rewritten some of the elements of this paragraph: The theoretical debate in political philosophy continues with Robert Nozick's argument against Rawls in his book "Anarchy, State, and Utopia" (1974). Nozick's view contrasts sharply with Rawls' and the rest of egalitarians, basing his argument on the notion of legitimacy. In Nozick's theory, distributive justice is incompatible with individual rights and is directly related to the notion of entitlement. Justice is understood in terms of equal property rights. Nozick (1974, p.151) proposes three principles of justice that refer to entitlement and regulate the distribution of property: he proposes three principles of justice that refer to the notion of entitlement and regulate the distribution of property: First: a person who acquires a holding in accordance with justice in acquisition is entitled to that holding. Second: a person who acquires a holding in accordance with the principle of justice in transfer from someone else entitled to the holding is entitled to the holding. Third: no one is entitled to a holding except by (repeated) applications of the first and second principles. In addition, he argues for a minimal state whose function is to guarantee individual liberties before other rights. This mirrors libertarianism/liberalism (Locke 1948), which holds that individual rights must be shown

unconditional respect and opposes distribution within a welfare state.

Capabilities approach:

- *R1: To me it seems unnatural to present Sen as a contrast to the egalitarians. For on the author's presentation, Sen's view of justice is that this requires that 'capabilities are equalized…'. The egalitarians the author cites in the section on egalitarians disagree on the principle of distributive justice (Difference Principle, Ex ante equality) and on what should be distributed according to this principle (primary goods, resources, 'advantage'). Sen's view can be seen as one more view on what should be distributed, namely capabilities.*

-A: This is a very important point. I have moved Sen up to group him with the egalitarians. I have also modified the text throughout to reflect the points raised in the comment: Amartya Sen's (1992) capability approach participates in the theoretical discussion of the concept of inequality by focusing on the difference in 'functionings' between people. The main argument of the approach is that poverty should not be measured solely by income distribution in lower percentiles but rather by a level of deprivation in various functionings such as literacy, good health, and political participation. Sen illustrates his argument with a simple example showing the difference between someone on a hunger strike and a starving person. By the end of the day, both have neither eaten nor earned wages. The main difference between the two is that a hunger striker has the ability to return to work and has a place to stay, while a starving person is deprived of these capabilities. Therefore, in Sen's reasoning, the starving person does not have the same functionings as someone on a hunger strike. In Sen's framework, capabilities refer to a set of functionings available to people. His concept of fair justice is when such capabilities are equalized at their highest possible level over all economic regimes so that functionings are freely available for all people. While Amartya Sen's (1992) capability approach is insightful and innovative in its focus on the initial conditions that determine poverty for individuals or groups, it is not directly related to economic inequality. Rather, it is related to poverty, which is often associated with those in the lower part of the income or wealth distribution. However, larger inequality does not necessarily mean higher poverty, and vice versa. Poverty can be thought of as an inequality measure focused on the bottom of the distribution, but there is no 'spontaneous, general, and unidirectional relationship between growth, inequality, and poverty' (Atkinson & Bourguignon, 2001). It is important to note that Sen's view can be seen as one more view on what should be distributed - namely capabilities - alongside other egalitarian views such as Rawls' Difference Principle and Dworkin's ex ante equality, which focus on distributing primary goods resources or 'advantage'.

A Reconciliatory Theory?

- *R1: Again, Roemer may belong more naturally with the egalitarians, than as an alternative to them. Moreover, several claims in this section are incorrect. The distinction between effort and circumstance is not central to Rawls. Utilitarians need not have a view on what part of behaviour is choice or circumstance. Page numbers are lacking in this section, making it hard to check the author's claims. It is not clear exactly why the author thinks Roemer is a reconciliation between all three of capability theory, utilitarianism and egalitarianism.*

-A: Thank you for the suggestion. After a careful rereading of the sources, I have moved Roemer up with the egalitarians and have removed the claims of it being a reconciliation theory. The modified paragraphs in the section are as follows: Roemer (1998a) proposes a new theory of equality of opportunity. Roemer (p.302, 1993; p.5, 1998a) suggests five categories to be considered in his theory: circumstance (similar to Dworkin, where a person is not held responsible), type, effort (where the person is held responsible), objective, and

policy. Leveling the playing field for him means guaranteeing that those who apply equal degrees of effort towards their own objectives end up with equal achievement, regardless of their circumstances. Inequality of opportunity is essentially an ex ante concept concerned with an equal starting point, whereas much redistribution is related to ex post outcomes (Atkinson, 2015). However, Roemer does not consider the dynamics of inequalities after the opportunities have been equalized. Educational achievement, wealth, employment status, income, utility, or welfare are all various outcomes of inequality but all seem to be dynamic concepts. Roemer's theory must be used in conjunction with rigorous empirical models to fully contain its exploratory power. Roemer argues that there is consequently a 'before' and an 'after' in the notion of equality of opportunity: before competition starts, opportunities must be equalized by social intervention if need be; but after it begins, individuals are on their own (Roemer, 1998a, p.2). This approach allows for individuals to be held accountable for achievements of particular objectives such as education employment health or income, while also ensuring that opportunities are equalized before competition starts.

- *R1: As economic theory lies outside my area of expertise, I do not have much to say about the part of the paper starting from 'Economic inequality: an economics' perspective'; it would be good if this part receive feedback from another reviewer.*

Conclusion:

- *R1: The author is right that political philosophy theories on distributive justice are normative, and deal with normative concepts and concerns such as fairness. However, I find the author's claim that this makes them not suitable for cross-national and time-variant research debatable. It requires discussion and more backing, if the author wants to affirm this. Many political philosophers will disagree, and be of the opinion that answering questions such as whether a society is becoming more or less just over time is exactly what their theories should help with. Admittedly, it would take a fair amount of work to operationalize how this could be done, as we have no access to e.g. different individuals' welfare, and some primary goods and capabilities may be hard to measure. Thus, I agree that one may debate whether these theories really are suitable for cross-national or time-variant research. But in my opintion it is not reasonable to make this controversial claim without more backing.*
  -A: I agree with your comment, and have rewritten the conclusions. Please see the revised conclusions at the end of this section.
- *R1: The author suggests that 'most political philosophers use distributive justice as the closest term to equality'. This is incorrect. Indeed, this review presents the views of philosophers who have different views on whether distributive justice requires equality or permits inequalities, and if so, which. Thus, 'distributive justice' is not a term that means almost the same thing as equality. Distributive justice is a normative term for what justice requires of distribution in a society, and equality is one possible answer to that question. Other distributive justice theorists in political philosophy will for example say that distributive justice requires that everyone has enough, but that it has nothing to do with equality at all (this view is however not discussed in this article).*
- -A: I agree with your comment, and have rewritten the conclusions. Please see the revised conclusions at the end of this section.

- *R1: Finally, the paper seems to end by suggesting a reconciliatory note, suggesting that*

economics and political philosophy agree that equality is the goal, and that the disagreement only concerns 'the tools, the need and the weight of different aspects of the problem of inequality'. I do not think this suggestion follows from the review, and I also think it is false. It is not clear that there is a disagreement between economists and political philosophers in the first place, nor do I think the main body of the review suggests that there is one. Rather, I think the review documents that economists and political philosophers are studying different aspects of equality. For example, there is no meaningful sense in which there is a disagreement between Scheidel's theory of the 'Four Horsemen of leveling' and Rawls' Theory of Justice. These are just theories about different things: about what tends to cause levelling, and what characterizes a just society, respectively. Finally, to reiterate, it is not the case that all philosophers agree that equality is the goal – the review also documents this – hence it cannot be the case that all philosophers and economists agree on this.

-A: I agree with your comment, and have rewritten the conclusions. Here is the revised version: This study provides a historical review of the parallel development of literature on distributive justice and inequality from the perspectives of political philosophers and economists. Debates among political philosophers, which originated in the 17th century, have primarily focused on conditions for redistribution, the definition of justice, and how to make society more just. These debates have evolved from discussions between egalitarians and utilitarians to modern theories of capabilities and inequality of opportunity. Ultimately, distributive justice is a normative term that describes what justice requires in terms of distribution within a society, with equality being one possible answer to that question. The second part of this review examines the economic perspective on inequality, including its definition, measurement, and causes. It explores theories ranging from Malthusian cycles to global inequality, as well as functional and institutional aspects. Economic inequality is mostly linked to the measurement of socioeconomic conditions at a specific point in time (although initial conditions or future income may also be considered), and often does not include considerations of fairness or institutional guarantees of liberty, equal opportunity, or fair distribution. This review shows that economists and political philosophers study different aspects of equality. For instance, there is no meaningful disagreement between Scheidel's theory of the 'Four Horsemen of Leveling' and Rawls' Theory of Justice, as these theories address different subjects: the causes of leveling and the characteristics of a just society, respectively. However, it is important to note that not all philosophers agree that equality is the goal, as documented in this review, and hence it cannot be assumed that all philosophers and economists share this view.

R1: Above I have summarized what I take to be the main errors in the presentation of views from political philosophy in the article. There are also minor errors and unclarities beyond what I can list here. I encourage the author to study the political philosophers cited in the article carefully and revise the article thoroughly if they want to pursue it further.

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