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## SOCIAL EQUITY: ANALYSIS OF CONCEPTS

### СОЦІАЛЬНА СПРАВЕДЛИВІСТЬ: АНАЛІЗ КОНЦЕПЦІЙ

#### ANNOTATION

The issues of social equity have been repeatedly studied by representatives of many sciences, both categorically as well as in social and practical aspects, to which the issues of equality, law and morality are referred to. The article deals with the theoretical background of concepts of social equity, reveals the nature, essence and content of understanding the social equity. It is proved that the essence of social equity is not abstract, but has its own specific-historical and concrete-cultural manifestation. Equity of socio-philosophical doctrines is considered as a social ideal. It reflects social reality, and its content is almost completely dependent on the development of society. It is determined that each stage of social development has its own views, ideas and ideals of social equity.

**Keywords:** economy, evolution, concept, social equity, principle, society, development.

#### АНОТАЦІЯ

У статті розглянуто теоретичні засади концепцій соціальної справедливості. Розкрито природу, сутність та зміст соціальної справедливості. Доведено, що зміст соціальної справедливості не є абстрактним, він має конкретно-історичну та конкретно-культурну форми прояву. Справедливість у соціально-філософських ученнях розглядається як суспільний ідеал. Вона відображає соціальну дійсність, а її зміст фактично повністю залежить від розвитку суспільства. Визначено, що кожний етап розвитку суспільства має власні уявлення, ідеї та ідеали соціальної справедливості.

**Ключові слова:** економіка, еволюція, концепція, соціальна справедливість, принцип, суспільство, розвиток.

#### АННОТАЦИЯ

В статье рассмотрены теоретические основы концепций социальной справедливости, раскрыты природа, сущность и содержание социальной справедливости. Доказано, что содержание социальной справедливости не является абстрактным, оно имеет свою конкретно-историческую и конкретно-культурную форму проявления. Справедливость в экономических и социально-философских учениях рассматривается как общественный идеал. Она отражает социальную действительность, а ее содержание фактически полностью зависит от развития общества. Определено, что каждый этап развития общества имеет собственные представления, идеи и идеалы социальной справедливости.

**Ключевые слова:** экономика, эволюция, концепция, социальная справедливость, принцип, общество, развитие.

**Articulation of issue.** One of the major problems facing Ukrainian society and the world can be determined as the problem of social inequality and equity. There are many reasons for occurring problems of social inequality and equity that can be observed at all the levels of public life. We can take for example globalization, which contributes to the formation of a gap between rich and poor countries, thus increasing social inequality of citizens of these countries and the absence of equality between people when born. A personality has its own unique set of skills when born that is

attributable to genetics and bears no relation to personal merit. However, a talented person has the right to a greater reward. In connection therewith, there comes up a problem of remunerating a talented person in comparison with an untalented one. Attempts of researchers to create a real «ideal» model of social organization in which all members of society would be equal, have come to nought. Just that makes the analysis of existing concepts of social equity so important [1-3].

**Analysis of recent research and publications.** Not only numerous foreign scientists: D. Lvov, V. Dobrenkov, A. Kravchenko, I. Krylova, G. Kanarsh, R. Greenberg etc. paid attention to the problems of social equity and inequality in their works but also such domestic researchers as O. Holovashchenko A. Hrynenko, M. Slatenkova, O. Chubuchna and others. M.V. Ptoukha Institute for Demography and Social Studies of the National Academy of Sciences of Ukraine, State Institution «Institute of Economics and Forecasting of NAS of Ukraine,» State Institution «M.I. Dolishnii Institute for Regional Studies of NAS of Ukraine» and Institute for Industrial Economics of NAS of Ukraine are also engaged into studying the issues of social equity in Ukraine. It is worth noting that, despite the extensive experience of scientists in studying the problems of social equity, some aspects still require further studying and clarification.

**Problem definition.** The purpose of this article is studying and analyzing the concepts of social equity.

**Presentation of basic material of the research.** The first European thinker who addressed the issue of equity was an ancient Greek philosopher Plato. His idealistic concept considers equity on several levels. First, equity, in his opinion, is harmonious and balanced state of the three principles of the human soul, where the mind takes the first place. Equity is a regularity of development. Second, equity is the highest virtue in a state that is based on the principles of well-being. He believes that society is then just, when everyone fully realizes the abilities granted to him by the nature [3].

Aristotle's ideas regarding the views on equity, found reflection in his realistic concept. Aristotle was the first who noted the existence of equity and attempted to define it. Equality between all the members of society, which is not absolute, in his opinion, is equity. The types of equity defined

by this thinker have been still relevant. In his opinion, equity, acting in the field of material values produced by people and providing equal remuneration for equal work, compatibility of the price with the value of a thing, compensation of the inflicted damage – is equalizing. The principle of proportionality, according to a certain criteria, between people implies distributive equity. However, the distribution provides a distributor, while he has more significant position in society than other process participants. It shall be noted that equalizing equity acts in relations between people. In turn, distributive equity can be attributed to the functions of the state [8].

Another representative of Antiquity, a Roman statesman, orator Marcus Tullius Cicero, thinks that equity is inherent to every individual and is an essential characteristic of human nature. In his works he focuses attention not on just property division between people but on the legal equality. In his opinion, equity «gives people what they deserve and preserves equality between them» [3].

An English philosopher and statesman T. Hobbes tried to formulate the ideas of equity, based on the knowledge of the legal framework. He emphasizes that all people are equal by nature when born. Consequently, having the same natural potential, people actively apply for public goods, that results in competition; equality between people creates preconditions for dialogue, providing people with a chance to reach an agreement [3; 8].

An English philosopher John Locke paid great attention in his works to the problems of social relationships, exploring the principles that form the relationship between people, he defined equity as a natural law. According to John Locke, not only freedom and mind, but also morality – a viewpoint that determines his understanding of equity is typical for each person [2].

The analysis of the works of such representatives of modern age as T. Hobbes and John Locke led to certain conclusions. In the works of these authors, equity is defined not in terms of well-being but is based on the postulates of rights. The task of the state, according to these authors – is to ensure natural rights of a person. It should be noted that the concept of equity in a liberal context ceases to be a proper political concept due to its deep transformation. The subject area of equity now is not so much power as rights, determining the attitude of individuals to each other and to the state.

A French philosopher, Jean Jacques Rousseau, determined that passion is the basis for the actions of any individual. The only natural honesty, being of great significance in a person's life – is the ability to empathize. It is the basis of social interaction. This leads the French philosopher to the understanding of equity: first, as its personal feeling, second, as its rational context. According to J.J. Rousseau, only in the presence of organized society, property and laws, one can speak about equity. He noted that social equity cannot be achieved under the conditions of income ine-

quality. However, in his opinion, socialization of private property, will not contribute to the development of equity in society. J.J. Rousseau stood out for the elimination of polarization of wealth and poverty, explaining that any developed country should be able to redistribute resources from the rich to the poor and that large percentage of the middle class shall prevail in society [5; 10].

A German philosopher, Immanuel Kant, in his moral and political concept attempted to solve the problems of freedom. The main difference of his views is his proving the possibility of individual freedom, which at the same time would not be disruptive for the existing political order. He stressed «if equity disappears, the life on the Earth will be devalued». According to I. Kant, equity is manifested in the following forms: punitive and distributive – the basis for writing laws by the government [4].

A famous German philosopher G.W.F. Hegel also concerns the problem of equity in his writings. He focuses his attention on the relativity of concepts of equity and inequity. Since they are based on the differences of values, the quantitative indicators can shift to quality ones, turning equity into injustice inequity [4].

In his works, K. Marx noted that «instinctively the mind of people in terms of social equity comes from real opportunities of society» [12]. The problems of social equity are exacerbated in such cases as, for example, appropriation of property by a group of persons or not very effective usage of opportunities [1].

The purpose of John Rawls's work is to determine the functioning of major social institutions that provide stability and self-regulation of modern democratic rationally organized society. Equity, in his opinion, is the root cause of social order. In connection therewith, he considers equity as a principle of social organization. When giving definition of equity, he refers to concepts of equality and inequality. Equity, according to John Rawls, serves as a measure of the degree of equality and inequality between people. People shall be equal in their rights and this equality shall be determined by the law. They shall be equal when distributing social values. However, inequality when distributing social values shall also be fair, when such an unequal distribution takes the benefits of each person into account [9].

According to R. Nozyk, the right of every person to equal protection by the state is the equity. In this regard, the American philosopher defined two types of the state: ultra-minimal that is more identified with the commercial organization than with a subject of equity, since it provides security services only to those people who are able to pay and the minimal, which extends its protection to all the individuals living within its territory. The very «minimal state» is just. In his theory he also defined economic equity as a set of rules that organizes social space for free exchange of goods and services [3].

In his book «Sovereign Virtue, The Theory and Practice of Equality» R. Dworkin presented ideas of equality and equity. He believed that the state and the society shall have no right to decline from the ideals of equality and equity. If the government fails to demonstrate equal concern for the fate of its citizens who are subject to its power and whose loyalty it enjoys, then the government shall be considered not legitimate. He defines equal care as sovereign dignity of a political community. It shall be questioned where national wealth is unevenly distributed. Such a distribution can be observed in most developed countries [2; 13].

The key categories for the theory of equity, according to A. McIntyre, are community and merits. Being a member of the community, every person has his social identity. This social identity determines his social role and social obligations inherited by him with respect to the group. These merits of the person to the community and his contribution to the common welfare determine the person's position in the system of distribution of tangible and intangible values of the community. In other words, the hierarchy of society members, their position is based on the evaluation of their merits to the group, evaluation of their contribution to the common welfare. In this regard, hierarchization shall be performed based on their benefit to society, social practices: the value of certain activities and the extent of their impact on the increase of common welfare shall be determined [3; 12].

A. Sen and M. Nassbaum worked at the intersection of economic theory and ethics. The scientific work of these authors was considered as an alternative to the two dominant approaches in economic theory – utilitarianism of rational choice and the concept of resource endowment. It shall be noted that the concept of A. Sen and M. Nassbaum is «based on the possibilities» and refers primarily to studying and evaluating actual living conditions rather than fixing on comparing rational advantages of individuals and their material resource endowment [11].

Academician D. Lvov considered in his works the problems of theory and practice of social equity. He believed that the model of society providing equal access rights of its members to profit received from the use of natural resources is ideal. These rights, according to him, are reflected in the available medical services, education and affordable housing, guaranteed minimum wages and pension. He noted that «rather than seeking for the wealth and its symbolic expressions (wasteful and prestigious consumption), one shall seek for life of quality. However, this quality cannot be achieved individually without simultaneous increasing the quality of life of others [6].

Domestic scientists are also engaged into studying the issues of social equity. This, O. Makarova in the monograph «Social Policy in Ukraine» considers equity through the prism of social policy. The author analyzes and identifies features and

differences in the perception of equity among representatives of different cultures. According to her, this analysis can serve as a background for studying the reasons for success or failure of social policies, and will help to use their advantages and avert failure [7].

**Conclusion.** Thus, the analysis of existing theories and opinions of various authors, specified in the literature, devoted to the study of social equity, has shown that its ideas have changed under the influence of time. In summary it can be said that the conceptual and categorical framework of generalized theory of equity requires additional clarification for the development of its criteria and norms. In turn, such systematization requires additional statistics.

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