

Why (not) paternalism?
Perspectives from
relational egalitarianism

Anne-Sofie Greisen Højlund

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Aarhus BSS, Aarhus University

Bartholins Allé 7

DK-8000 Aarhus C

Denmark

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Anne-Sofie Greisen Højlund
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1. Introduction

Increasing the price of alcohol and tobacco, adding deterring illustrations to cigarette packages and lowering the salience of fatty and sugary foods in supermarkets are familiar examples of policies that are typically at least partly justified by appeal to the good of those subjected to them. Indeed, they are what we term “paternalistic” policies. Such policies are controversial, both politically and philosophically. To realize this, we need only recall the struggles faced by the former Mayor of New York Michael Bloomberg when he attempted to introduce a limit on soft drink size. Albeit seemingly innocuous, the proposal sparked great opposition and never made it to the implementation phase (Weiner 2013). Paternalism triggers numerous moral questions of which many center on autonomy infringement, which has been discussed at length since John Stuart Mill first articulated that “the only purpose for which power can be rightfully exercised over any member of a civilized community, against his will, is to prevent harm to others. His own good [...] is not a sufficient warrant” (Mill 1909: 18; see also Feinberg 1986). However, this dissertation focuses primarily on equality.

It is empirically well documented that behavioral patterns that cause disadvantages tend to track the lines of socially salient groups (Grill 2017: 158). For instance, women are more reluctant than men to run for political office (Fox and Lawless 2011; 2014: 504-505; Pate and Fox 2018; Pfanzelt and Spies 2019: 44), lifestyle-related health deficiencies are more widespread among those with low socioeconomic status (Hatzenbuehler et al. 2013; Marmot 2005; 2017; Marmot and Wilkinson 1999; Smith et al. 1990), and even in aging democracies, voter turnout differs considerably between the ethnic majority population and (descendants of) immigrants (Hansen 2017; see also Schlozman et al. 2018). On this basis, some distributive egalitarians claim that paternalistic policies bear huge potential as they can serve as tools for bringing about a less unequal distribution of health, political influence or whatever one takes to be a valuable good (Arneson 1989; see also Grill 2017). However, relational egalitarians object that justice is not ultimately a matter of securing certain distributions of goods but rather of securing that we relate to each other in a certain way, namely as equals. According to them (and proponents of related views), a state endorsing paternalistic policies fails by this standard. Most prominently, Elizabeth Anderson objects that when the state acts paternalistically, it “effectively [tells] citizens that they are too stupid to run their [own] lives” (1999: 301), thereby treating them as if they were children. Along similar lines of reasoning, Seana Shiffrin holds that paternalism “is special because it represents a positive [...] effort by another to insert her will and have

it exert control merely because of its (perhaps only alleged) superiority. As such it directly expresses insufficient respect for the underlying valuable capacities, powers and entitlements of the autonomous agent” (2000: 220). The apparent conflict expressed in these views provides the starting point for this dissertation in which I examine the following research question:

Is paternalism compatible with relational egalitarianism?

Why is this an important question? Practically, if one takes relational egalitarianism to be a compelling theory of justice, which many do, the answer to the research question contributes to delineating the scope of permissible (and required) public policies at a non-ideal level. Consider the case of lifestyle-related health deficiencies. If it turns out that the critics are right that paternalism is not compatible with relational egalitarianism, this contradicts a variety of widely endorsed public health initiatives, including those mentioned at the outset of this introduction. Yet, if it turns out that they are not right, this can be taken as indirect support of the implementation of (at least some) seemingly desirable paternalistic policies even in contexts of considerable opposition.¹

Philosophically, the answer to the research question is important because it sheds light on the plausibility of relational egalitarianism—a rather young but increasingly endorsed theory of justice. To the extent that the investigation reveals that the theory has (im)plausible implications when it comes to the permissibility of paternalism, it is left strengthened (weakened) vis-à-vis competing theories that have more (im)plausible implications. The answer to the research question should thus be of distinctive interest to philosophers with an interest in contemporary egalitarian theorizing, including those who are not so practically minded. While much attention has been dedicated to the ways in which paternalism compromises egalitarian relations, whether it may sometimes promote such relations remains underexplored. In a nutshell, the aim of this dissertation is to cater to both sides of the issue in order to provide a fuller understanding of the relationship. Here is an overview of the papers comprising the dissertation:

1. What should egalitarian policies express? The case of paternalism (abb. “What should egalitarian policies express?”). *Journal of Political Philosophy*, 29, 4, 519-538.
2. Avoiding stigmatization in paternalistic health policy (abb. “Avoiding stigmatization”). Forthcoming in *Social Theory and Practice*.

¹ I here speak of “indirect” support, as defeating an objection to paternalism is not the same as arguing in its favor.

3. What should relational egalitarians believe? Online first in *Politics, Philosophy & Economics*.
4. Mitigating servility: Policies of egalitarian self-relations (abb. “Mitigating servility”). Online first in *British Journal of Political Science*.
5. The wrongs and remedies of political inequality (abb. “The wrongs and remedies”). *Under review*.

In the remainder of the summary, I aim to show how these five papers together respond to the research question, proceeding as follows. In chapter 2, I introduce the state of the art in the research field in the interest of showing how the dissertation both builds on the existing literature on paternalism and relational egalitarianism and reacts to the widely held view that the two are incompatible. In chapter 3, I summarize the first three papers and indicate how they contribute to answering the research question. In doing so, I show how they respond to three distinct objections to paternalism that follow from a principled commitment to relational egalitarianism, namely a concern with expressions of attitudes, a concern with stigmatizing effects of such expressions and a concern with the underlying attitudes (or beliefs) that render paternalistic action rational. I defend the claim that paternalism is in fact compatible with relational egalitarianism under certain conditions. In chapter 4, I summarize the last two papers in the interest of showing that paternalism is not only compatible with relational egalitarianism (under certain conditions) but sometimes effectively furthers relational egalitarian goals and more so than alternative measures. To that end, I focus on the case of political voice. In chapter 5, I sketch the methodology underlying the papers to show how I have reached my conclusions.

2. Preliminaries

Before responding to the research question, it is worthwhile to take a step back to address some of the issues that play an important but to some extent inexplicit role across the five papers. In turn, this will help situate the contribution of the dissertation in relation to two strands of literature: that on relational egalitarianism and that on paternalism. In this chapter, I sketch the contours of each and, on this basis, spell out the apparent conflict.

2.1. Relational egalitarianism

Since the publication of Rawls' seminal work *A Theory of Justice* (1971), egalitarian theorizing has been broadly divided between those who prefer luck egalitarianism (e.g. Arneson 1989; Cohen 1989; R. Dworkin 1981; 2002; Knight 2021; Rakowski 1991; Roemer 1996; Segall 2009) and those who prefer relational egalitarianism (e.g. Anderson 1999; 2010a; 2010b; Fourie et al. 2015; Kolodny 2014; McTernan 2018; Miller 1997; Scanlon 2003; Scheffler 2003; 2015; Schemmel 2012; Viehoff 2014; Voigt 2018; Young 1990).² According to the former view, a situation is just only if everyone's distributive shares reflect nothing other than their comparative exercise of responsibility (Lippert-Rasmussen 2018: 3). By contrast, according to the latter view, a situation is just only if everyone relates to one another as equals (Lippert-Rasmussen 2018: 7). Crucially, relational inequality can exist even if luck egalitarian justice obtains. To see this, consider a society in which everyone's distributive shares reflect nothing other than their comparative exercise of responsibility, but the prevalence of racial prejudice results in segregation (cp. Anderson 2010a) or systematic misrepresentation of the testimonies of members of certain racial groups (cp. Fricker 2007).³ Before going deeper into the details

² Some seem to think that this divide is fundamental in the sense that the two traditions of thought are mutually exclusive (Anderson 2010b), whereas others take them to be compatible. The latter view has given rise to ecumenical or hybrid theories of egalitarian justice that build on both distributive and relational elements (Lippert-Rasmussen 2018: 205-210; Moles and Parr 2018).

³ Proponents of luck egalitarianism have suggested that their framework can in fact capture these seeming relational inequalities as they can be re-described in distributive terms. That is, in terms of an unconventional "good" of having equal standing to that of others that ought to be distributed according to luck egalitarian principles (Lippert-Rasmussen 2015: 238). In response, critics have argued that this strategy ends up mischaracterizing our ultimate concerns with social relations (Axelsen and Bidadanure 2019: 339-341).

of relational egalitarianism, I want to stress that the aim of this chapter is not to defend (any particular version of) this theory vis-à-vis luck egalitarianism, which would indeed require a project of its own, but to introduce some important debates in the field.

The central project of relational egalitarianism can be defined negatively in terms of doing away with paradigmatic inequalitarian relationships such as those entailed by marginalization, status hierarchies, domination, exploitation and cultural imperialism (Young 1990) and positively in terms of achieving a society in which people stand as equals. Admittedly, the latter is a very abstract ideal that can be (and has been) interpreted in various ways. For that reason, in what follows, I present some central distinctions that will help clarify to which versions of relational egalitarianism my arguments speak.

First, the ideal of relating as equals is comprised by two components, namely a behavioral and an attitudinal. Accordingly, we should both treat and regard each other as equals. While it is often the case that the way people regard one another is manifested in the way they treat one another, these two components can come apart. To clarify intuitions, think of a racist employee who regards members of other racial groups as inferiors but nevertheless opportunistically treats them as equals out of fear of being sanctioned at their egalitarian workplace (Lippert-Rasmussen 2018: 71-72). Even though their racist attitude is not manifested in treatment, it seems that the racist employee fails to relate to their coworkers as equals.⁴ For this reason, both components are of distinct importance.

Second, internal to the behavioral component, we may distinguish between different notions of what it is to treat others in a certain way. According to Lippert-Rasmussen (2018), we can identify at least five such notions of which I will presently be concerned with two, namely the motivational and the expressive, as they are the ones to which authors most commonly appeal.⁵ The motivational notion “requires that [we] act on normative beliefs of a certain kind and that these beliefs are what determine how [we] treat others” (Lippert-Rasmussen 2018: 76). This view is reflected in Samuel Scheffler’s (2015: 25) idea of an egalitarian deliberative constraint according to which parties to an egalitarian relationship have a standing disposition to treat each other’s

⁴ The same is true in the reverse case in which an employee who believes that all people are equals (in the relevant sense) treats members of other racial groups as inferiors out of fear of being sanctioned at their racist workplace.

⁵ These are distinct from the normative, the communicative and the presuppositional notions, which I will not say more about here. For a fuller overview, see Lippert-Rasmussen 2018: 73-80.

strong interests as equally constraining of their joint decisions. On the expressive notion, we should treat others in a way that expresses that they are equals (in the relevant sense). This view is endorsed by Anderson (1999) and Schemmel (2012), of which the latter holds that “what is primarily justice relevant about the way institutions treat people is the *attitude* towards individuals and groups that is *expressed* in institutional action” (Schemmel 2012: 124, italics in original). But how do we determine what treatment expresses? This is a complicated task, and the literature has yet to reach consensus. Some hold that what treatment expresses is determined by its “public meaning,” which cannot be reduced to communicative intensions on the one hand or how it is interpreted by others on the other (Anderson and Pildes 2000). Rather, it should be settled by an external normative judgment of how well we express the attitudes we ought to have toward others (ibid: 1513). On another view, we should give greater weight to how others might reasonably understand treatment given the relevant social and cultural context that is shared in a society (Hellman 2008: 59-85; Schemmel 2012: 138). And on a third view, we should let the sender’s actual attitudes count in our evaluation of what their treatment of others expresses (Voigt 2018). Why is the distinction between the motivational notion of treatment and the expressive notion of treatment relevant? As others have pointed to, it might be that treating others as equals in the motivational sense—that is, by treating their strong interests as equally constraining—is in tension with treating them as equals in the expressive sense (Lippert-Rasmussen 2018: 78-79). Thus, sometimes, different aspects of what egalitarian treatment entails pull in different directions (Voigt 2018: 447-448). For example, considering the case of food vouchers and free school meals, Wolff and De-Shalit (2007) suggest that while “these, on the surface, seem an excellent way of addressing poor nutrition or hunger, [...] nevertheless they can be stigmatizing if administered in such a way as to make it obvious that some people need to rely on state support.”⁶

Third, just as luck egalitarians and other distributive theorists face the question of what it is that should be distributed equally among people, relational egalitarians face the analogous question in which domains we should relate as equals. While much attention has been given to the former matter (see, for instance, Cohen 1989; Sen 1980), relational egalitarians are rarely explicit about what they mean when they claim that we should relate as equals. Plausibly, what most have in mind is that we should relate as equals in terms of moral standing. This dissertation relies on a conjunctive understanding of what this takes. Accordingly, we should relate as equals in terms of the weight

⁶ As I explain below, stigmatization cannot be reduced to a matter of expression. However, the latter may provide a basis for the former.

of our strong interests and in terms of the weight of our agency. The former concern is reflected in Scheffler's (2015) idea of an egalitarian deliberative constraint (see above). The latter builds on a Rawlsian notion of people having equal moral powers (Anderson 1999: 312; Quong 2011: 100-101; Rawls 2005: 19). As this idea is elaborated in the papers comprising the dissertation (see, in particular, "What should egalitarian policies express?"), I will not say more about it here but instead turn to other domains in which we potentially ought to relate as equals as well. According to Lippert-Rasmussen (2018), these include at least the epistemic domain, the social domain, the aesthetic domain and the empirical domain. Even though there are emerging literatures on inequalities within each of these domains, to date explicit connections to relational egalitarianism have not been made. Yet it seems that relational egalitarians qua relational egalitarians should be concerned about inequalities of epistemic standing such as "the kind of hermeneutical inability of privileged white subjects to recognize and make sense of their racial identities, experiences, and social positionality" (Medina 2012: 201, see also Fricker 2007), inequalities of social standing such as hierarchies of prestige that differentiate academics from people with vocational training (Abrassart and Wolter 2020; Koulaidis et al 2006; Wolf 2011), inequalities of aesthetic standing such as those entailed by "lookism" (Mason 2007; 2021; Mason and Minerva 2020; Minerva 2017; Moreau 2020) and racial profiling (Basu 2019; Hosein 2018; Lever 2011), which might be termed an inequality of empirical standing. Applying insights from relational egalitarianism to these and similar cases seems to bear huge potential for future research projects.

Fourth, in the preceding paragraphs, I have used the terms "people" and "we" to flesh out different notions of treating/relating to others in a certain way. At this point, we may ask who it is that should relate as equals, distinguishing between inter-individual relations and institutional-individual relations. Many accounts of relational egalitarianism focus on relations among individuals. Here are some examples. When describing paradigmatic cases of inequality, Niko Kolodny (2014: 292) writes, "the servant is subordinate to the lord of the manor, the slave subordinate to the master [...] the plebian is lower than the patrician, the untouchable lower than the Brahmin." Juliana Bidadunure (2016: 235) asks us to imagine "a city in which elderly people live in miserable retirement homes while younger people flourish in lovely affluent residences." And Emily McTernan takes the case of "clutching [one's] bag closer on seeing a young black man approach on the street" as a point of departure. These are all cases in which an individual or group fails to relate to another individual or group as equals. By contrast, other accounts focus on relations between institutions and individuals. On these accounts, "how institutions treat people has relevance to social justice that is independent of, or at least

not reducible to, the distributive effects of such treatment” (Schemmel 2012: 125). This view resonates with Anderson’s (1999: 289) objection to states expressing that some are inferior to others in the worth of their lives, talents and personal qualities. Arguably, a convincing version of relational egalitarianism would require that both the inter-individual and the institutional-individual level are taken into account. While the two levels are clearly not independent (Voigt 2018: 439), they should be treated as distinct for both analytical and practical purposes.⁷

Up to this point, my focus has been on the content of relational egalitarianism. Before concluding this section, I will briefly say something about its justification. After all, why should we relate as equals? In response to this question, we may claim that relating as equals is either valuable or required. We can ascribe the view that relating as equals is valuable to “telic” relational egalitarians. Something can be valuable either personally or impersonally, and it can be so either instrumentally or non-instrumentally. On this basis, we can, at least in principle, distinguish four accounts of the value of relational equality (or the disvalue of relational inequality) (Tomlin 2015: 158). Most telic relational egalitarians believe that relating as equals is personally valuable; that is, it makes people’s lives better. For example, Scheffler (2005: 19; cited in Tomlin 2015) holds that inequalitarian “societies compromise human flourishing; they limit personal freedom, corrupt human relationships, undermine self-respect and inhibit truthful living [whereas] an egalitarian society helps to promote the flourishing of its citizens.” These are ways in which Scheffler takes egalitarian relations to be personally good in the instrumental sense (see also Anderson 2008: 19; Scanlon 2003). Yet he also seems to think that there is a non-instrumental aspect to their value in claiming that “to live in society as an equal is a good thing in its own right” (ibid). Others believe that relating as equals primarily has impersonal value. Most prominently, Martin O’Neill (2008: 130) has argued:

The reasons to which Non-Intrinsic egalitarianism appeals are themselves generated by distinctively egalitarian concerns with the badness of servility, exploitation, domination, and differences in status. The badness of these outcomes can best be understood by virtue of the contrasting value of certain kinds of fraternal, egalitarian social relations. The existence of these kinds of social relations should itself be seen as intrinsically valuable, independent of the positive effects that such relations may have for individual welfare.

The accounts that seek to defend relational equality by reference to its value thus vary considerably. Yet not everyone thinks that relational equality is primarily valuable. We may term those who endorse the view that relating as

⁷ I will return to this point below.

equals is morally required “deontic” relational egalitarians.⁸ This view entails that since we are moral equals, we should relate as such simply as a matter of justice. For example, Schemmel (2011: 366) holds that “the objection to [inegalitarian] relationships is not merely that they are, in some sense, bad for people, but that they constitute unjust treatment.” However, he modifies this point by noting that we should care about egalitarian “relationships ‘not merely’ because they make people’s lives go better but because they are required by justice even when (in an individual instance) they don’t make people’s lives go better” (Tomlin 2015: 166). Emphasizing “an individual instance” is important as it seems counterintuitive to claim that we should always relate as equals as a matter of justice, even if it were generally bad for people (ibid: footnote 54). This supports the view that a plausible justification of relational egalitarianism should include an appeal to personal value. On this note, I conclude my review of relational egalitarianism and turn to the other core concept of the dissertation, namely paternalism.

2.2. Paternalism

The etymology of paternalism, rooted in the Latin “pater,” which means “father,” refers to a type of behavior by a superior toward an inferior resembling that of a male parent toward his child. While most agree at the level of this rough characterization, the literature includes a broad span of conceptual specifications of paternalism (Arneson 1980; De Marneffe 2006; Dworkin 1971; Feinberg 1986; Gert and Culver 1976; Groll 2012; Le Grand and New 2015; Mill 1909; Quong 2011; Shiffrin 2000; Thaler and Sunstein 2003; Tsai 2014; Vandever 1986). In order to make my arguments speak to a broad audience, this dissertation relies on a rather inclusive definition. Thus, by paternalism, I refer to a reason-based understanding of the term according to which the good of a person is accepted as a relevant (not necessarily decisive) reason in favor of bypassing their agency in self-regarding matters (Dworkin 2019; Feinberg 1986: 4; Pedersen and Midtgaard 2018: 773). In this section, I elaborate on each of the central components of the definition with a view to situating it in the existing literature.

First, that a reason is “not necessarily decisive” means that it can be defeated by competing, and stronger, reasons. Crucially, what distinguishes paternalists from anti-paternalists is not that the former believe that we should give ultimate weight to the good of others, but rather that it should count as a reason, alongside others, in our assessments of what would be the morally

⁸ The distinction between telic and deontic egalitarianism was originally coined by Parfit (1998).

right thing to do. In Viki Pedersen's (2019: 36) words, "while anti-paternalists reject paternalistic reasons (or reject these as ever being decisive), no reasonable paternalist would rule out the very likely existence of relevant non-paternalistic reasons." This means that one can be a paternalist and not endorse particular (or even any) paternalistic interventions.

Second, most take an appeal to "the good of people" to be a defining feature of paternalism in either a motivational or a justificatory sense.⁹ According to Dworkin (2019), paternalistic reasons can refer to somewhat different ends including the welfare, good, happiness, needs, interests or values of those subjected to an intervention. Some believe that paternalism should always aim at promoting the good in a subjectivist sense, meaning according to people's own conceptions of the good life (Thaler and Sunstein 2003; Le Grand and New 2015: 103-104). They believe that paternalism can be justified to the extent that it can help correct reasoning failures that are empirically evident. As we shall see below, behavioral economists have found that we oftentimes fail to realize our conceptions of the good life (Kahneman 2011). However, it cannot be empirically proved that we fail to have the "right" conceptions of the good life. In Le Grand and New's (2015: 104) words, "this kind of failure would involve not acting in our best interests because, in the judgment of someone other than ourselves, either we have not properly identified our best interests or our identified best interests are simply wrong." While subjectivists find such reasoning overly controversial, not everyone resists it. Indeed, objectivists with respect to the good believe that "what is good for its own sake for a person is fixed independently of her attitudes and opinions toward it" (Arneson 1999; Arneson 2000: 38). In between these two poles, we can identify a moderate position that what is valuable is not what people actually want, choose or enjoy but what they would ideally want, choose or enjoy if they were more instrumentally rational, better informed or better able to imagine alternatives (Sher 1997). There is thus plenty of room for disagreement with respect to the good that paternalistic interventions should promote. However, there is also some disagreement whether promoting the good—however conceptualized—is a necessary condition for paternalistic interventions. Most prominently, Shiffrin (2000) has argued that this is not the case. She points to the example of an interlocutor raising his hand at a talk. Just as he begins articulating his point, another person in the auditorium interrupts and takes over, believing that she is better suited to phrase the question in a clear and eloquent way out of a concern to make progress on the topic being considered

⁹ For an act to count as paternalistic on the former view, it must be motivated by a concern for the good of those interfered with, whereas on the latter view, it must be justified by appeal to such a concern (de Marneffe 2006).

(Shiffrin 2000: 217). Finding this an intuitive case of paternalism, Shiffrin claims that paternalistic interventions should be defined in terms of having an effect on others' legitimate sphere of agency as opposed to promoting their good in some sense.

Third, by "their agency" I refer to the judgment or will of those interfered with. This distinction points to two different ways in which we may fail to further our own good effectively. On the one hand, we may suffer from status quo bias and therefore fail to judge correctly how we should prioritize current spending versus future spending; we may underestimate the risk of incurring lung cancer as a result of smoking; and we may decide differently on whether to undergo surgery depending on whether we are told that 90 percent survive or that 10 percent die (Le Grand and New 2015: 82-97). These are all examples of failures of judgment. On the other hand, we may very well know how we should prioritize spending over a lifetime, the objective risks of smoking and the prospects of undergoing surgery while failing to act accordingly. That is, we may suffer from *akrasia*, meaning that we "know what a virtuous person should do and accept this (rather than being simply 'evil' and rejecting virtue as worthless) but suffer from the influence of the emotions or feelings that sometimes override [our] reason" (Le Grand and New 2015: 97-98). On my definition, paternalistic interventions may aim at correcting both kinds of agential failures.

Four, "bypassing" can refer to a variety of means, including removing an option from the choice set, increasing (decreasing) the costs of an option in the choice set and changing the salience of an option in the choice set (cp. Grill 2017). In policy terms, they correspond to legal mandates, incentives offers/disincentives taxes and nudges, which cover subtle interventions in people's choice environments (Thaler and Sunstein 2003; 2009). According to some, we might add to this list attempts at rational persuasion that resemble these other means in the sense that they similarly bypass people's agency (Tsai 2014). Allowing for such a diverse range of means to count as paternalistic makes the definition employed in this dissertation considerably broader than some of the classic ones that presuppose restrictions of liberty. For instance, in some of his early writings, Arneson holds that "[p]aternalistic policies are restrictions on a person's liberty which are justified exclusively by consideration for that person's own good" (1980: 471).¹⁰ Yet it seems that paternalism

¹⁰ A similar notion is found in de Marneffe (2006) as well as in some of the early writings of Dworkin, who understands paternalism as "the interference with a person's liberty of action justified by reasons referring exclusively to the welfare, good, happiness, needs, interests or values of the person being coerced" (Dworkin 1971: 181).

might take the form of omissions. Suppose that a friend asks to borrow 100 pounds from me. I have the money and could easily meet their wish, but I suspect that they would spend it on cake, which I believe would not be good for them, so I refuse (cp. Quong 2011: 75). Paternalism might also take the form of offers, such as when the state subsidizes opera tickets on the assumption that consuming highbrow culture will be good for people (Le Grand and New 2015: 12). In fact, as Thaler and Sunstein (2003) have pointed out, interventions that exploit our cognitive biases can count as paternalistic, even though they do not in any way affect the options in the choice set.

As the preceding discussion reveals, defining paternalism is not a straightforward task, and even though the concept has been subject to scholarly attention for centuries, it is still a source of disagreement. Having outlined relational egalitarianism on the one hand and paternalism on the other, in the following section I introduce the apparent conflict between the two.

2.3. The apparent conflict

Among relational egalitarians, Elizabeth Anderson explicitly objects to paternalism for implying a hierarchy between moral agents who are in fact equals. Indeed, she claims that acting paternalistically effectively tells others that they are too stupid to run their own lives (Anderson 1999: 301). Many others object to paternalism for similar reasons, although they are not committed to relational egalitarianism (e.g. Flanigan 2016; Quong 2011; Shiffrin 2000). In this section, I take a theorist-centered approach to whether paternalism is compatible with relational egalitarianism by focusing on claims asserted by authors who subscribe to relational egalitarianism (or to related positions). In doing so, I lay out what I term the “apparent conflict.” In the next section, I turn to my own work, which takes a more theory-centered approach, by focusing on what follows from a principled commitment to relational egalitarianism.¹¹

To bring out the idea that paternalism is objectionable because it implies a hierarchy between moral agents who are in fact equals, consider the following claims. Tsai (2014: 87) writes:

Paternalist distrust by A toward B can consist in A’s judgment that B is insufficiently competent to advance B’s own interests, or that B is less competent than A to do so.

¹¹ For more on the distinction between a *theorist*- and a *theory*-centered approach, see Lippert-Rasmussen (2018: 34).

Shiffrin (2000: 220) writes:

[Paternalism] is special because it represents a positive [...] effort by another to insert her will and have it exert control merely because of its (perhaps only alleged) superiority. As such it directly expresses insufficient respect for the underlying valuable capacities, powers and entitlements of the autonomous agent.

Quong (2011: 105) writes:

[w]hen the state [provides paternalistic financial incentives], it shows citizens a lack of respect by treating them as if they [...] lack the ability to learn about and appreciate valuable things without being offered a financial incentive to do so.¹²

Even though only Anderson explicitly subscribes to relational egalitarianism, the quoted authors all object to paternalism on the basis of relational concerns. In short, what is found objectionable about paternalism is internal to the relationship between the agents involved: The paternalist fails to relate to the paternalized as an equal in an important sense by implying that they are unable or unlikely to act in their own best interest. Thus understood, paternalism is insulting, demeaning and disrespectful; it is something that we have strong reason to refrain from in our dealings with others.¹³

This line of objection differs considerably from classic Millian anti-paternalism according to which paternalism is objectionable because it compromises liberty, freedom, self-sovereignty, autonomy or some related notion¹⁴ (e.g. Andersen 2021; Enoch 2016; Feinberg 1986; Mill 1909).¹⁵ In Mill's words,

¹² See also Cornell: "Paternalistic actions imply that the actor knows better than the subject with regard to a matter within the subject's sphere of control, and paternalistic actions are impermissible insofar as this expression is offensive" (2015, p. 1314f); Flanigan: "Paternalistic public policies (...) express offensive or insulting views of citizens' ability to make their own decisions, which should concern egalitarians and non-egalitarians alike" (2016, p. 9); and Groll: "she [the paternalist] believes the other person is likely to fail to exercise a capacity for sound judgment in the situation at hand" (2012: 718).

¹³ While some speak of paternalism being "presumptively" (Quong 2011) or "at least *prima facie*" (Shiffrin 2000) objectionable, others seem to find it nearly always impermissible (Anderson 1999; Flanigan 2016). Among proponents of the latter view, Anderson is open to there being some exceptions from a rule against paternalism, noting that seat belt mandates do not seem insulting (1999: 302), whereas Flanigan (2016) finds *even* seat belt mandates unjustified.

¹⁴ Henceforth, I use "autonomy" as a placeholder for any of these notions.

¹⁵ For discussion, see Arneson (1989; 2005), Conly (2012), Husak (1981) and Scoccia (2008).

“in the part which merely concerns himself, his independence is, of right, absolute. Over himself, over his own body and mind, the individual is sovereign” (1909: 19). What is the relationship between the two lines of objection to paternalism? They are clearly related in the sense that the relational view is also concerned with autonomy, albeit in an indirect sense. That is, paternalism is objectionable not (primarily) because it compromises autonomy but because it implies either that those subjected to it do not, to an equal extent, possess the capacities of autonomous agents or that they are unlikely to exercise them well (Shiffrin 2000: 220). Compared to the autonomy view, the relational view is somewhat broader in scope. This is because it enables us to deem objectionable seemingly paternalistic interventions that do not involve any effect on autonomy whatsoever. To clarify intuitions, Shiffrin (2000: 213) gives the following example:

Suppose B has no valid claim to A’s assistance but asks A, an acquaintance, for help building a set of shelves. A refuses, but not because A is too busy or disinclined to help. In fact, A is eager to deploy her carpentry skills. She declines on the grounds that B too often asks for assistance to his own detriment: He is failing to learn for himself the skills that he needs, or perhaps he displays unwarranted insecurity in his own skills.

Intuitively, this is a case of paternalism, and to the extent that it strikes us as objectionable, it cannot be so for reasons having to do with autonomy. Yet it implies the kind of hierarchy between moral agents to which proponents of the relational view object. The same can be said about certain cases of rational persuasion (Tsai 2014) that proponents of the relational view might find more objectionable than proponents of the autonomy view.

Having sketched the central lines of the apparent conflict as it has been articulated in the literature, we are left with a rather gloomy picture of paternalism. Indeed, it looks like something relational egalitarians (and others) have strong reason to resist. Against this backdrop, I turn to discussing my own work. In doing so, I aim to show that a principled commitment to relational egalitarianism does not rule out paternalism. As we shall see, the two are in fact compatible under certain conditions.

3. Is paternalism compatible with relational egalitarianism?

This chapter summarizes my work on the question of whether paternalism is compatible with relational egalitarianism. As noted above, I take a theory-centered approach to answering this question. Accordingly, in “What should egalitarian policies express?,” “Avoiding stigmatization” and “What should relational egalitarians believe?,” I infer three objections to paternalism from a principled commitment to relational egalitarianism.¹⁶ In turn, I discuss whether, or to what extent, they can be defeated. Before proceeding, a few remarks on the connection between the three papers are in order. “What should egalitarian policies express?” focuses on the expressive content of paternalism in and of itself; what attitudes the state expresses towards people when it acts paternalistically. “Avoiding stigmatization” takes a downstream perspective by focusing on the effects of such expressions in the form of stigmatization, whereas “What should relational egalitarians believe?” takes an upstream perspective by focusing on the beliefs underlying paternalistic action; that is, the doxastic attitudes that make it rational for agents to act paternalistically.

3.1. The expressivist objection

In “What should egalitarian policies express?,” I elaborate on the apparent conflict within an expressivist framework. That is, I take the commonly held view that paternalistic action is objectionable because it conveys the message that those interfered with are not sufficiently, or equally, capable of effectively furthering their own good (Anderson 1999; Cornell 2015; Flanigan 2016; Quong 2011; Shiffrin 2000) to reflect expressivist concerns.

While some take paternalistic expressions to be (nearly always) impermissible, others take them to provide strong pro tanto reasons against paternalism. Thus, if these authors are right, we should either never act paternalistically, or we would have to come up with strong countervailing reasons to be justified in doing so, at least expressively speaking. Judging from the existing literature, it is not at all clear what, if anything, could defeat the expressivist objection to paternalism. Against this backdrop, “What should egalitarian policies express?” is intended to do two things. First, it reconstructs the apparent conflict by situating it within the framework of relational egalitarianism:

¹⁶ This is not to say that I have explored all possible objections to paternalism that could be phrased from the perspective of relational egalitarianism.

The expressivist objection: Paternalism is objectionable when and because it expresses that people are not equals in terms of their moral standing.

Second, it shows what it takes to defeat the expressivist objection to paternalism, *within* an expressivist framework. This latter point is crucial, as it might not be uncommon to believe that the expressivist objection to paternalism can be defeated by non-expressivist concerns, such as the substantial benefits a given paternalistic intervention would produce. This might be what, for instance, Quong (2011) and Shiffrin (2000: 220) are after when they claim that paternalism is presumptively or at least *prima facie* objectionable, respectively. By contrast, the task I have taken on me is to explore whether acting paternalistically is sometimes *expressively* permissible or even required. In doing so, I argue that just as paternalistic policies can be expressively objectionable, so can refraining from adopting such policies in cases where people risk incurring great harm. This is because both kinds of expressive content can come into tension with recognizing people as equals in terms of their moral standing. On the one hand, intervening paternalistically may express that people are not equal moral agents. On the other, not intervening may express that their strong interests do not matter just as much as those of others do—i.e. if we stand idly by when people are about to jump from high cliffs into shallow waters. If the argument is correct, we should not always rule out paternalism on expressivist grounds. Indeed, sometimes acting paternalistically is the right thing to do, even expressively speaking. In those cases, the conflict is only apparent.

3.2. The stigmatization objection

In “Avoiding stigmatization,” I address a particular type of effect that may result from adopting paternalistic policies, namely stigmatization. Notably, there is a close connection between the expressivist objection and the stigmatization objection as “problematic expression is likely to undermine egalitarian relationships” (Voigt 2018: 448). However, such expression is neither necessary nor sufficient for stigmatization (or other inegalitarian relationships) to occur.¹⁷ Therefore, we should consider the two objections as distinct. We can summarize the stigmatization objection as follows:

¹⁷ On the one hand, something can be expressively objectionable without having any effects whatsoever. Voigt (2018: 448) mentions the example of a sign saying “white people only,” which would be expressively objectionable even if no one ever saw it. On the other hand, stigmatization (or other kinds of inegalitarian interpersonal relationships) can exist in the presence of a state expressing that all people are equals.

The stigmatization objection: Paternalism is objectionable when and because it increases stigmatization.

Taking the case of lifestyle diseases as my point of departure, I show that adopting paternalistic policies as a means to combat such diseases sometimes—intended or not—contributes to stigmatizing those they are supposed to benefit. This, I argue, provides a strong, albeit not decisive, objection to such policies. The argument speaks to two prominent views in the literature. On the one hand, Arneson (2007: 33), who represents a consequentialist position and enjoins certain stigmatizing policies, claims that

By bringing it about that members of society are fearful of being shamed and averse to stigma and disgust, and by attaching these sentiments to appropriate social standards, the society produces just consequences to a greater extent than would otherwise be possible. The relevant point is simply that a society that seeks a reasonable level of conformity to the standards it reveres should not work with one hand tied behind its back by eschewing the use of powerful human motivations.

On the other hand, Nussbaum (2004: 226), who leans toward a deontological position, claims that “the law should not cause citizens degradation or humiliation any more than it should participate in slavery.” As these sentiments are closely connected to stigma, at least when experienced, what Nussbaum is advocating seems to approximate rejecting stigmatization altogether.

I argue that stigmatization is a core case of relational inequality that should be avoided, to the greatest extent possible, due to its personal badness. This conclusion falls somewhere in between those reached by Arneson (2007) and Nussbaum (2004) respectively as it provides a strong case against stigmatization while allowing for some trade-offs within the overall aim of reducing relational inequality:

The fact that a policy is non-stigmatizing provides a pro tanto reason to favor it over other and more stigmatizing policies. This is consistent with opting for a policy that is more stigmatizing but that promotes goals of relational equality better overall. The reason for this is that non-stigmatization is only part of what relational equality requires, and hence, it is only one among a range of salient aims to meet when paternalistic health policy is designed. In this calculation, health surely also matters, which is why we should not give up on paternalistic health policies even though this would, perhaps, be the most effective way of reducing stigmatization (Hojlund, forthcoming: 20).

Having said that, not all paternalistic interventions increase stigmatization, as they sometimes can be designed in a way that does not single out anyone in an objectionable manner, which is arguably the case of, for example, cancer-

screening programs as they are currently practiced. Thus, not all paternalism is objectionable for reasons having to do with stigmatization.

3.3. The belief objection

In “What should relational egalitarians believe?,” I turn to the moral relevance of paternalistic beliefs; that is, the doxastic attitudes that make paternalistic action rational. To clarify what I mean, suppose I believe my friend is completely competent and likely to effectively further their own good in the context of making an important decision about saving for retirement. All else equal, it would not make much sense for me to intervene to ensure that they will end up with a savings plan that effectively furthers their good (however specified). Yet if I believe they are not competent or likely to achieve this end, or at least less so than me, this gives me a disposition to intervene paternalistically. Many take this kind of belief to account for at least part of what is objectionable about paternalism (Groll 2012: 718; Quong 2011: 80; Shiffrin 2000: 218; Tsai 2014: 86-87). For instance, Quong (2011: 80; 74) writes:

[The paternalizing] A’s act is motivated by a negative judgement about [the paternalized] B’s ability [...] to make the right decision or manage the particular situation in a way that will effectively advance B’s welfare, good, happiness, needs, interests, or values. [...] I claim that it is this negative judgement regarding others that captures the distinctive nature of paternalism.

Yet, as Enoch (2016) has pointed out, it is not clear that paternalism could ever be morally objectionable for reasons that have to do with belief (or judgement). The problem is this:

Paternalism, if it is wrong, is morally wrong; but it is far from obvious that beliefs or judgements can be morally wrong at all. The norms that (directly) govern beliefs are epistemic norms, not moral (or other practical) ones. And so, if you want to include something about the relevant judgements in your characterization of paternalism or what is typically objectionable about it, you should have something to say about the relations between epistemic and moral norms, or between the moral status of beliefs and action (Enoch 2016: 23).

Against this backdrop, I set out to answer Enoch’s challenge by appealing to moral encroachment, which, admittedly, is a controversial view not immune to criticism. By encroachment, I refer to the view that whether a person has knowledge of a proposition sometimes depends on considerations that do not bear on the truth or likelihood of the proposition (Fritz 2020: 3051). In turn, such considerations can be of a moral sort. I argue that moral considerations of relational equality can have a bearing on what we should believe about others when facing evidence that they are unable or unlikely to effectively further

their own good. Recall that relating to others as equals requires both regarding and treating them as such. From this core commitment it follows that if holding beliefs about others in a certain way is at odds with regarding them as equals in terms of their moral standing, then relational equality seems to engender epistemic implications. Hence:

The belief objection: Paternalism is objectionable when and because it is at odds with regarding others as moral equals.

Arguably, all paternalism involves beliefs that make it objectionable in this sense. However, sometimes we should believe paternalistically about others after all. This is because relating to others as equals sometimes requires paternalistic action, and paternalistic beliefs are dispositions to paternalistic action. Thus, while the belief objection to paternalism targets all paternalistic interventions, in some cases it can be defeated by other considerations of relational equality, such as securing critical goods.

At this point, we are left with the following picture: Sometimes, the three objections to paternalism—the expressivist objection, the stigmatization objection and the belief objection—can be defeated, at least to the extent that we should not always oppose it.

4. Does relational egalitarianism require paternalism? The case of political voice

Thus far, I have shown that the three objections to paternalism can be defeated, under certain conditions. This suffices to provide an affirmative answer to the research question: Under certain conditions, paternalism is compatible with relational egalitarianism. In this chapter, I take a step further and argue that, sometimes, intervening paternalistically might even be required by relational egalitarianism. For current purposes, I focus on the case of political voice understood as activities undertaken with the intent and/or effect of influencing government action through expressions of preferences (Schlozman et al. 2018: 24). In “Mitigating servility,” I look into servility as a cause of inequality in political voice and show that certain paternalistic policies may serve as means to combat it. Yet in this paper, I do not argue at length for why less controversial measures could not do the job just as well or perhaps even better. I do so in “The wrongs and remedies.” Here I explore the potential of three different policies in the context of equalizing voter turnout and conclude that paternalism is effective when less controversial alternatives fall short. Together, the two papers make a strong case for the distinctive equality-enhancing potential of certain paternalistic policies.

4.1. Political speaking situations

Most work on relational egalitarianism takes as its point of departure cases in which a person or a group of people fail to relate to another person or group of people on a footing of equality. Paradigmatic cases of this sort include discrimination, marginalization, domination and exploitation (e.g. Young 1990). Such relationships are obviously objectionable from the perspective of relational egalitarianism, and many believe that the primary negative aim of relational egalitarianism is to eradicate or protect against them. For instance, Schemmel (2012: 142, italics in original) writes:

[According to] a liberal relational egalitarian account of social justice, [...] institutions treat individuals with the proper attitude when they offer them adequate and equal structural protection against unjust treatment by *other individuals*, against ending up on the wrong end of inequalitarian relationships. Such a view would, for example, make sure that individuals are not dominated by others, that others cannot interfere with their choices in an arbitrary manner.

In many cases, failures to relate to others as equals have distributive implications. To see how that is so, think of university applicants who are discriminated against and face comparatively worse educational prospects as a result. Or think of workers who are being exploited and not paid what they are due. The close connection between such inequalities gives rise to thinking that we should find objectionable not only inegalitarian relations as such but also the inegalitarian outcomes they are intertwined with. According to Anderson (2010a: 18, italics in original),

An inequality in the distribution of some good is unjust if it *embodies* unjust social relations, is *caused* by unjust relations (interactions, processes) among people, or *causes* such unjust relations. This standard enables us to assess as unjust various group inequalities that might not be severe enough to count as forms of oppression, although they violate democratic demands for social equality. (It also reminds us that whether an inequality in the distribution of some good is unjust usually depends on the processes that produce or maintain it.)

In “Mitigating servility,” I explore whether the same is true in the context of failure to relate to *oneself* as an equal. That is, whether failure to relate to oneself as an equal as well as the inegalitarian outcomes that are closely connected to it are objectionable. In brief, I argue that servility constitutes a deviation from the ideal of relational equality that is personally bad in much the same way as deviations from relational equality that are due to failures on the part of others. On this basis, I explore what can be done to mitigate servility as well as its adverse distributive effects in the context of political voice. Relational egalitarians have paid attention to the importance of equality in the political domain (Kolodny 2014; Viehoff 2014; Bengtson 2020), and some have defended differential voting weights (Bengtson 2020) and elective quotas (Bengtson MS) as equalizing measures. In “Mitigating servility,” I build a novel argument for the adoption of certain paternalistic interventions in the form of rotation schemes in political speaking situations, arguing that such measures are likely to be effective in targeting attitudinal barriers to political voice. This is not to say that they can replace differential voting weights and elective quotas, but rather that they are well suited to address the share of inequality in political voice that is due to servility (and related attitudes).

The upshot of the paper is that adopting paternalistic rotation schemes is likely to help combat servility as well as the resulting inequality in political voice. In turn, this provides a strong pro tanto case for relational egalitarians to endorse the measure.

4.2. Voter turnout

While in “Mitigating servility,” I show that certain paternalistic measures are likely to be effective in reducing inequality in the political domain, in “The wrongs and remedies” I take a step further in arguing that they are sometimes required by relational egalitarianism. To that end, I ask whether certain paternalistic measures are not only likely to be effective in reducing inequality but considerably more so than less controversial alternatives.

In answering this question, I turn to the case of voter turnout, which has been shown to vary significantly across ethnic groups (K. M. Hansen 2017; Schlozman et al. 2018), age groups (Irwin 1974; Print 2007) and socioeconomic groups (Schlozman et al. 2018). Drawing on empirical research, I show that compulsory voting is an effective means to reduce inequality in voter turnout substantially—something that has not been achieved by less controversial measures such as removing barriers to voting and adopting affirmative action in the form of outreach policies and preference policies. On this basis, I defend compulsory voting as a case of paternalism against three objections from relational egalitarianism.

So what is the broader relevance of this argument? One might ask then if we should adopt compulsory voting in real-life politics. In response to this point, it should be noted that the task I have taken on me is to answer whether relational egalitarianism requires compulsory voting under non-ideal circumstances. This entails showing that compulsory voting promotes some aspects of relational equality better than alternative schemes might plausibly do without compromising other aspects to an unacceptable degree. Answering whether compulsory voting compromises *other* values to an unacceptable degree goes beyond the scope of the paper. Admittedly, in the broader moral picture, making voting compulsory is a more controversial policy than introducing rotation schemes in political speaking situations as I discussed above. Compulsory voting is a coercive policy, which means that people can be fined if they do not comply. By contrast, introducing rotation schemes in political speaking situations is a nudge, and people can opt out of speaking if they find it very costly, or if they simply do not want to. Those who believe that concerns of relational equality should be balanced against concerns of autonomy might thus find compulsory voting unacceptably restrictive. Indeed, some people might have a good reason not to vote, or they might want to spend their lives pursuing other ends than political participation. From an autonomy perspective, making voting compulsory might be hard to justify to these people. However, this does not change the fact that compulsory voting is required to promote equality in the political domain. Hence, while the argument does not

ground a complete policy recommendation, it suffices to establish the conclusion that sometimes achieving relational equality does in fact require paternalism.

5. Reflections on methodology

Having summarized my work on whether paternalism is compatible with relational egalitarianism, I will dedicate this final chapter to some reflections on how I have reached my conclusions. Within contemporary analytical political theory, it is common to rely on the methodology known as “reflective equilibrium.” Roughly, we have achieved reflective equilibrium when there is coherence between our normative principles on the one hand and our considered judgments with respect to particular cases on the other. In the context of this dissertation, we have achieved a reflective equilibrium of a narrow sort when there is coherence between central facets of relational egalitarianism and our considered judgments with respect to paternalism. The goal of reflective equilibrium is to build a grand mutually supportive system in which the truth or reasonableness of each proposition depends on its being coherent with the others (Hansen and Midtgaard 2016; List and Valentini 2016; Knight 2017). Indeed, this rather abstract ideal does not say much about how to practice analytical political theory. In the following, I will therefore try to be as concrete as possible by outlining three practical guidelines or “methods” that I have used in building my arguments. Notably, these guidelines are not sufficient to achieve reflective equilibrium, which is a very ambitious task, even if it is to be of a narrow sort. Nevertheless, the practical guidelines contribute to achieving this goal as well as to translating relational egalitarian principles into policy.

5.1. Conceptual analysis

When political theorists work on “freedom” or “democracy,” they often do so out of a fundamental conviction that these concepts denote something that is desirable. Similarly, many, including myself, are persuaded that this is the case of “relational equality.” In turn, part of my motivation for working on this concept is to clarify it in order to express principles in terms of it that ultimately may provide guidance to moral agents, including policy-makers (List and Valentini 2016: 530). Achieving this goal presupposes that we know what relational (in)equality is. As Lippert-Rasmussen (2018: 61) has it, it “is impossible to answer the pressing question of why it is desirable to relate as equals without being able to say what relational equality is.” Similarly, it is impossible to answer the question of whether paternalism is compatible with relational egalitarianism without being able to say what relational equality is.

The answer to the research question thus depends on how we conceptualize each of the core concepts: paternalism and relational (in)equality. While I

have deliberately worked from a very inclusive notion of paternalism,¹⁸ part of the contribution of the dissertation consists of developing a plausible notion of relational (in)equality. As a starting point, I have asked in which domains we should relate as equals. Intuitively, we do not want our notion of relational (in)equality to include inequalities of people’s height or abilities to solve complex mathematical problems. Rather, we want a notion of relational (in)equality that enables us to identify, for example, sexist, racist and homophobic relations as objectionable. To that end, I have focused on relational (in)equality in terms of moral standing (while remaining agnostic with respect to whether we should also relate as equals in other domains). In turn, I have argued that moral standing entails both an interests dimension and an agency dimension. I develop this idea in “What should egalitarian policies express?” and use it as a foundation for the subsequent papers. In the next section, I elaborate on the role adopting this dual understanding of moral standing has played in building my arguments for a conditional endorsement of paternalism—something that is closely connected to consistency considerations.¹⁹

5.2. Consistency

Consistency is a general methodological requirement that applies to all scientific disciplines, including political theory (Holtug 2011: 282), and more broadly to beliefs as such. To bring out the idea of consistency, say that a principle P entails the implication I . If we accept P , we must also accept I , or else we run into inconsistency. This is a problem since nothing follows from an inconsistent set of statements (List and Valentini 2016: 539). That is, a set of statements containing P and $\sim I$, and where P entails I is of no use. In the broader picture, analyzing whether P and I are consistent is a way of moving towards reflective equilibrium. That is, if P and I turn out not to be consistent, we should revise at least one of the statements (or accept that they are simply inconsistent).

In several of the papers comprising this dissertation, I make use of consistency analysis to show that relational egalitarians who qua relational egalitarians endorse anti-paternalism occupy an unstable position. This is because a commitment to relational egalitarianism is inconsistent with a principled rejection of paternalism. As I have shown, sometimes rejecting paternalism

¹⁸ To clarify, this choice does not result from a conceptual analysis. Rather, I employ an inclusive definition of paternalism given the purposes of the dissertation.

¹⁹ Notably, consistency also plays a crucial role for the conceptual work on “relational equality,” as conceptual analysis, like other modes of analysis, should respect consistency requirements.

leads to relational inequality, just as, sometimes, adopting paternalism promotes relational equality (or reduces relational inequality). To put it formally, if anti-paternalism (P) entails relational inequality (I), and we want to achieve relational equality ($\sim I$), we end up with an inconsistent set of statements. The conceptual work on what it takes to relate as equals in terms of moral standing provides the groundwork for the consistency analysis: I show that when we adopt a dual understanding of what it takes to relate to others as equals in terms of moral standing—that accounts for both the agency and the interests dimension—consistency requires that relational egalitarians sometimes endorse paternalistic measures.

5.3. Comparisons

Paternalism comes in many shapes. This means that whether relational egalitarianism is compatible with or even requires paternalism might depend on the kind of intervention in question. Notably, comparing different kinds of interventions as I do in some of the papers is not so much a matter of achieving reflective equilibrium among a set of normative statements as it is a matter of settling what kind of paternalistic intervention to implement in a given practical context. One issue is whether an intervention is effective in promoting a given aspect of relational equality. Another issue is whether the intervention, if effective, is vulnerable to the three principled objections from relational egalitarianism, namely the expressivist objection, the belief objection and the stigmatization objection.

In “What should egalitarian policies express?” and “Avoiding stigmatization,” I show that while some paternalistic interventions are highly vulnerable to the expressivist objection and the stigmatization objection, this is not the case for other interventions. To that end, I develop sets of evaluative dimensions that enable us to compare different policy proposals. For example, I suggest that the extent to which a paternalistic health intervention is likely to increase stigmatization of those subjected to it depends on whether it relies on stigma effects, whether it singles out particular groups, whether it aims at preventing or discovering disease, and whether compliance is guaranteed. With these four dimensions in hand, we can compare different proposals that each provide a solution to a given problem and decide which one is preferable in terms of avoiding or minimizing stigmatization. Similarly, in “What should egalitarian policies express?,” I suggest that the expressive content of a paternalistic intervention depends on how it is designed. In “Mitigating servility,” I compare different policies in terms of how likely they are to be effective in making people pursue valuable opportunities they would otherwise have for-

feited. I distinguish between policies that work through agency-mediated effects and policies that work through non-agency-mediated effects and argue that the latter are more effective in achieving goals of relational equality (Hojlund 2021b: 6-7). This is important, because even if a policy escapes the relevant objections, it would not be of any practical relevance if it were not, at the same time, effective in combatting the problem at hand.

This concludes my reflections on the methodology as well as the practical guidelines employed in the dissertation.

6. Conclusion

This dissertation seeks to make progress on the question of whether paternalism is compatible with relational egalitarianism. In contrast to earlier work, it does so by catering to both the negative and the positive side of the issue. First, it (re)constructs three objections to paternalism from a principled commitment to relational egalitarianism: the expressivist objection, the stigmatization objection and the belief objection. While each of the three objections provides strong pro tanto reasons against paternalism, it is shown that they can be defeated under certain conditions. Second, the dissertation argues that, sometimes, relational egalitarianism might even require paternalism. That is, in some cases, paternalism is not only compatible with relational egalitarianism in the sense that the reasons against it can be defeated. Indeed, in these cases, there are reasons of relational egalitarianism in favor of paternalism that do not apply (at least not to the same extent) to alternative measures. These are important findings that contribute significantly to ongoing debates on paternalism.

Philosophically, many have rejected paternalism on the grounds of relational egalitarianism (or closely related grounds). If my findings are sound, these authors occupy an unstable position that needs revision. Indeed, if we are truly committed to the view that justice requires that people relate as equals in terms of moral standing, sometimes paternalism is called for. Surely, some will find this an unattractive implication that lessens the plausibility of relational egalitarianism. Yet I think we should find the alternative much worse. Indeed, as I have shown, a hands-off policy of standing idly by in situations where people risk jeopardizing their equal moral standing does not seem like a promising path to take for proponents of relational egalitarianism. In addition to casting light on the moral status of paternalism, the dissertation contributes to developing relational egalitarianism as a theory of justice. For example, it defends the novel claims that relational egalitarianism engenders epistemic implications, that we should relate to ourselves as equals just as we should to others, and that a plausible notion of equality of moral standing must account for interests in addition to agency.

Politically, the dissertation provides guidance as to when paternalism is a suitable measure to mitigate relational inequality and, more concretely, how to design policies that meet this aim at the smallest possible cost (in terms of relational equality). While relational equality is obviously not all that matters when designing policies, it is an important value that should figure accordingly. Thus, the dissertation provides important, albeit not exhaustive, insights into the context of combatting inequality in practice.

7. References

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8. Summary

This dissertation seeks to make progress on the question of whether paternalism is compatible with relational egalitarianism. In contrast to earlier work, it does so by catering to both the negative and the positive side of the issue. First, it (re)constructs three objections to paternalism from a principled commitment to relational egalitarianism: the expressivist objection, the stigmatization objection and the belief objection. While each of the three objections provides strong *pro tanto* reasons against paternalism, it is shown that they can be defeated under certain conditions. Second, the dissertation argues that, sometimes, relational egalitarianism might even require paternalism. That is, in some cases, paternalism is not only compatible with relational egalitarianism in the sense that the reasons against it can be defeated. Indeed, in these cases, there are reasons of relational egalitarianism in favor of paternalism that do not apply (at least not to the same extent) to alternative measures.

9. Dansk resume

Denne afhandling undersøger, hvorvidt paternalisme er foreneligt med relationel lighedsteori. I modsætning til tidligere bidrag til denne litteratur udforskes både den positive og den negative side af forholdet. Først (re)konstrueres tre indvendinger mod paternalisme, der følger af en principiel tilslutning til relationel lighed: Paternalistiske interventioner udtrykker, at vi ikke alle er lige hvad angår vores status som moralske agenter, de giver anledning til stigmatisering, og de hviler på et problematisk tankesæt. Mens indvendingerne hver især giver os stærke argumenter imod paternalisme, viser afhandlingen, at de under visse omstændigheder kan besejres. Den argumenterer endda for, at paternalisme i nogle situationer er en forudsætning for effektivt at mindske relationel ulighed. Det vil sige, at paternalistiske interventioner ikke blot er forenelige med relationel lighed i den forstand, at argumenterne imod dem kan besejres. I de pågældende situationer er der argumenter for paternalisme, som ikke (i samme omfang) giver støtte til alternative responser på ulighed.