

# Measuring Social Justice: A Serious Challenge

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As Simon Elias Unteregger has elaborated in his article *Exploring (Social) Justice: A Brief Overview*, there are different ways to define social justice, which also means that there are different ways to assess a country's state of social justice. Researchers have developed several indexes rating exactly this: how socially just different countries are. With the example of two indexes, I will explain why they are often a little confusing and seem contradictory to each other. Therefore, this paper aims to explain different ways in which the state of social justice is measured within countries.

## 1. EU and OECD Social Justice Index 2019

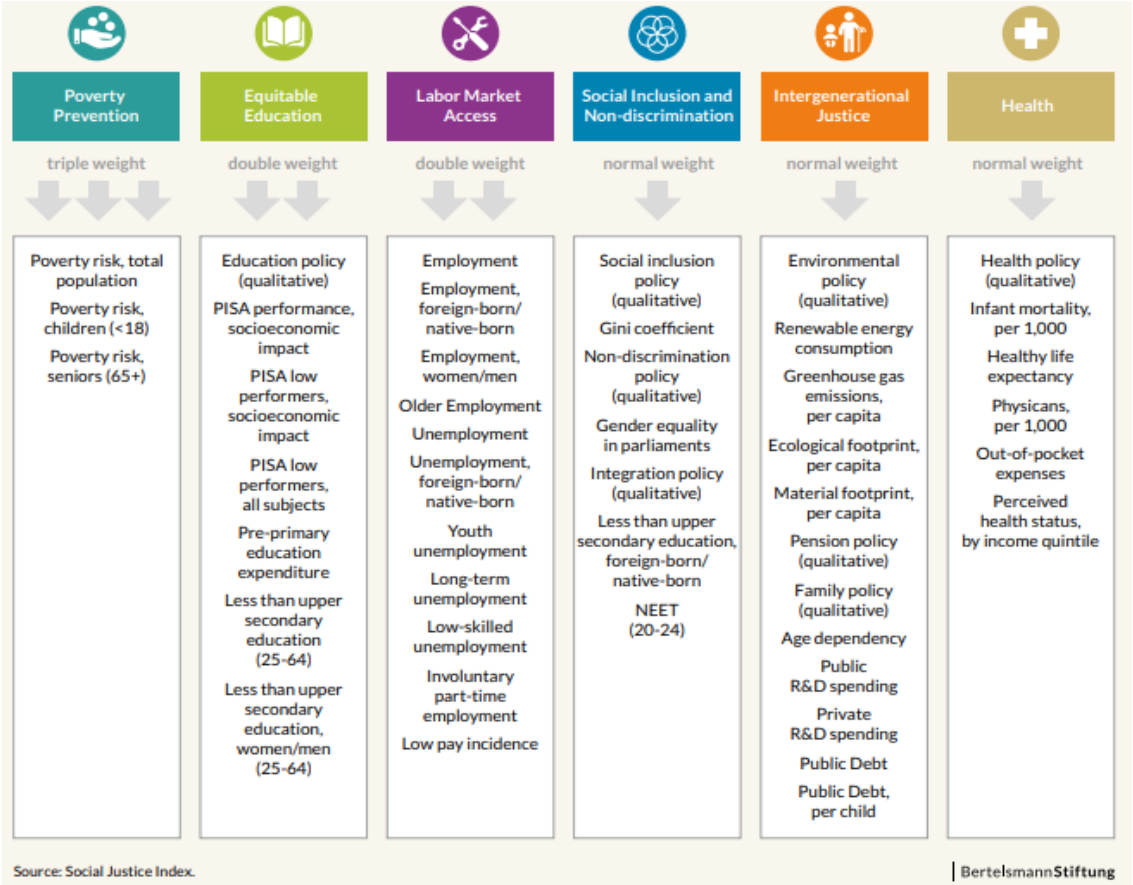
One index that is very prominent is the EU and OECD Social Justice Index 2019 by the Bertelsmann Stiftung. The reports states that while the Index "shows a slight but ongoing upwards trend since economic recovery began in 2014, the overall score remains below the pre-crisis level" (6). This sentence reveals that the European debt crisis starting in late 2009 had a great negative impact on the state of the countries' social justice. The major crises since 2019 and, in particular, the COVID-19 pandemic and the Ukrainian-Russian, war also had great socio-economic effects on OECD and EU countries. Therefore, they are most likely had a negative impact on the state of social justice in these nations.

### A) Concept and Methodology

The EU and OECD Social Justice Index 2019 contains an analysis of the state of social justice in the 41 countries that are either members of the EU or the OECD, or of both. It is built upon the understanding of the concept of social justice as an aim to guarantee

“each individual genuinely equal opportunities for self-realization through the targeted investment in the development of individual ‘capabilities’” (Hellmann, Schmidt and Heller, 2019: 129). Thus, every human being should be able to “pursue a self-determined course of life, and to participate in society more broadly”, independently of that person’s social backgrounds. The redistribution of resources within a community is seen as a required and justified means to achieve this goal, as to enable every member of the community to exploit the available opportunities. This redistribution is seen as an investment rather than a compensation. The EU and OECD Social Justice Index focuses on those policy areas which constitute great opportunities for civilians to participate in society. In fact, it is based on the following six dimensions: poverty prevention, equitable education, labor market access, social inclusion and non-discrimination, intergenerational justice, as well as health.

Some of these policy areas are weighted more heavily than others for the index. The authors refer to Merkel and Giebler (2009) who argue that poverty prevention, access to education, and labor market access, hold greater conceptual value than the other dimensions and, therefore, must be weighted more heavily. Moreover, Hellmann, Schmidt and Heller (2019) explain that "From the perspective of social justice, preventing poverty and social exclusion is in a certain sense a sine qua non for social justice, and thereby takes precedence over the other dimensions". Therefore, they give most weight to the dimension of poverty prevention. They come to the following weighting of the dimensions, using the following indicators:



## B) Main Findings

The main findings reveal that the Nordic countries were scoring best, with Iceland, Norway, Denmark, Finland, and Sweden taking up the first places in terms of the overall score. Iceland was found in all dimensions in the Top 7. Norway, Denmark, and Finland's success could also be seen throughout most of the dimensions, as they performed among the top 10 in all but labor market access and health. The five countries performing worst overall were Chile, Bulgaria, Romania, Turkey, and Mexico. The United States was also among the bottom-ranked countries as it occupied the 36th place, just ahead of Chile.

The report furthermore explains that the data revealed that Germany, the United Kingdom (UK), and France were among the top third overall. However, France and the UK showed great underperformance in specific dimensions. Moreover, those countries hit most by the eurozone crisis in 2009 (Greece, Italy, Spain, Portugal, and Turkey) had only partly reached the pre-crisis level of social justice. In fact, while Portugal had made clear progress, Greece, Spain, and Italy revealed great shortages especially in terms of labor market access. However, the question remains: How has the level of social justice changed in these countries due to the previous major crises?

## 2. Global Justice Index 2022

A more recent justice index is the Global Justice Index 2022 conducted by the Fudan Institute for Advanced Study in Social Sciences (Fudan IAS), an institute based in Shanghai, China.

### A) Concept and Methodology

The Global Justice Index 2022 is based on the measurement of three different conceptualizations of global justice. The rights-based conceptualization covers all legal sources and basic principles establishing legitimacy, such as Declarations ratified by the countries. The goods-based conceptualization of global justice views and measures justice as the material and institutional support that respective governments or institutions are obliged to provide. The last approach, the virtue-based approach, in turn, focuses on the individual's virtue, that is, whether the individual has an intrinsic pursuit of justice or follows regulations that they are compelled to follow. The institute does not further explain how it measures the latter approach. It explains: "The relationship between these three is interdependent, forming one holistic whole. They all work together, as follows: the rights-based conceptualization provides the basic structure (the bones), the goods-based conceptualization provides substantial material

support (the muscles), and the virtue-focused conceptualization provides personal motivation and internalized willingness (the heart).”

Furthermore, they base their selection of policy areas on the following two principles: the Common but Differentiated and Respective Capabilities (CBDR-RC), and the Cosmopolitan but Due-diligent Responsibilities (CDDR). The former refers to those issues with global implications that cannot be solved by the efforts of any single state, but rather that require all states to work together and be accountable. These issues are the following: (1) climate change (global warming), (2) peacekeeping, (3) humanitarian assistance, (4) terrorism and armed conflict, (5) transnational criminal police cooperation, and (6) refugees. Subject areas covered by CDDR are (7) poverty reduction, (8) education, (9) public health, and (10) protection of women and children. These policy areas fall under the purview of each state's domestic affairs. Nonetheless, a cosmopolitan responsibility applies to these areas for all states to assist as needed while adhering to mutual accountability. Depending on the data source used for the ranking of the countries in the specific policy areas, the index covers between 75 and 193 countries.

## B) Findings

The indexes reveal very different results. Is the main reason for this that a pandemic and other global crises lay between them? The answer is clearly no. The brief digression on global justice should have shown that the two indexes, the Global Justice Index and the EU and OECD Social Justice Index 2019, are not readily comparable. Firstly, they target different entities among which justice is sought. Moreover, they have (partially) different issues at heart. Moreover, the two indexes rank partly different countries: While the former examines the 41 EU and OECD countries, the latter evaluates many more countries.

Moreover, the reason for the divergent results is that the basic concepts underlying these indexes are fundamentally different. In fact, the EU and OECD Social Justice Index 2019 is based on an understanding of social justice as the provision of equal opportunities for self-realization for each individual through the targeted investment in the development of individual ‘capabilities’. This ideal cannot be found in the Global Justice Index 2022. Instead, this index does not explain the concept of social justice it is based on. However, through the data it uses it reveals that the index is rather built on absolute numbers rather than relatives. For instance, while both indexes assess the rate of those at risk of poverty in different countries, they use different data. The EU and OECD Social Justice Index 2019 elaborates how the countries fought against relative poverty, that is when the income of a household is below 50% of what an average household in the restrictive country receives. The Fudan IAS, in turn, looks at how states address absolute poverty. A household is in the state of absolute poverty when its income is below a certain level that is needed for the household to meet basic needs of

life, such as shelter, drinking water and food that is safe, healthcare etc. Thus, the latter index is less about self-realization of individuals, but rather about meeting basic needs.

Zhongyuan Wang and Sujian Guo (2022) explain that this divergent focus is often connected to whether scholars are looking at developed and liberal countries with strong electoral accountability or developing countries under authoritarian systems. As China is “a typical single-party country, [...] the political logic and process of poverty governance are distinctive from those of electoral democracies” (Wang and Guo, 2022: 210). Therefore, it is not surprising that the results of the indexes are very different: While Iceland, Denmark, Finland, Czechia, and Norway scored best in the EU and OECD Social Justice Index 2019 in terms of poverty prevention in 2019, the leading countries of the Global Justice Index for 2019 were China, India, Vietnam, Iceland, and Azerbaijan (Gu et al., 2022). Further EU and OECD countries that were ranked as best in anti-poverty aspect of promoting global justice in this index were Slovenia, Slovakia, Switzerland, and Czechia. In the EU and OECD Social Justice Index 2019, Slovenia ranked 8, Slovakia 11, and Switzerland 21. These results reveal the importance of understanding the methodology and the concepts underlying specific indexes when looking at them.

### 3. What to look at

While social justice refers to fairness manifested within a society, international justice concerns fairness among nations or states, and global justice concentrates on justice among human beings on a global level. Thus, the latter is primarily concerned with how fairness among individual human beings looks like and should look like. The main underlying question is: What do individual human beings owe one another? Nevertheless, global justice analyses do not avoid highlighting state-level obligations. In fact, as Gillian Brock and Nicole Hassoun (2023) reveal: “they consider a wider array of possible agents and organizations that might have duties as well.” But what is it, that we owe each other? What global duties do we have? These discourses have many facets, as they invoke many concerns, such as for human rights, respect for cultural pluralism, (just) war, humanitarian intervention, economic globalization, equality between men and women, imperialism and racial discrimination, immigration, global environmental concerns, global health issues, to just give a brief incomplete list. Many questions arise when thinking about global justice.

So, how should we assess countries in terms of their state of social justice and what is the current state? If we make it easy for ourselves, we follow the tradition and philosophy expressed in the constitutions, policies and other obligations made by Western countries, thus the definition of social justice to guarantee genuine equality of opportunity for the self-realization of all individuals.

What do the Western countries do to promote social and global justice? A fundamental basis for many social justice debates is the United Nations (UN) Universal

Declaration of Human Rights. It can often be used as a basis for arguing and identifying what obligations we have towards each other. The Charter was adopted by the UN General Assembly in December 1948. It contains the entitlements of every individual to rights and freedoms, without distinction of any kind, be it gender, race, language, etc. These rights are of a civil, political, and social nature. They imply, for instance, that every human being has the right to life, the prohibition of torture, equality before the law, freedom of religion, freedom of assembly, and freedom of expression. At their heart is the conviction and promotion of human dignity.

Based on these values, the UN Member States have adopted the 2030 Agenda for Sustainable Development. At the core of this agenda are its 17 Sustainable Development Goals (SDGs). These SDGs are the following: (1) No poverty, (2) zero hunger, (3) good health and well-being, (4) quality education, (5) gender equality, (6) clean water and sanitation, (7) affordable and clean energy, (8) decent work and economic growth, (9) industry, innovation and infrastructure, (10) reduced inequalities, (11) sustainable cities and communities, (12) responsible consumption and production, (13) climate action, (14) life below water, (15) life on land, (16) peace, justice, and strong institutions, and (17) partnerships for the goals. The SDG framework moreover has identified 169 targets and 247 indicators to specify and operationalize the goals.

These SDGs “are an urgent call for action by all countries - developed and developing - in a global partnership. They recognize that ending poverty and other deprivations must go hand-in-hand with strategies that improve health and education, reduce inequality, and spur economic growth – all while tackling climate change and working to preserve our oceans and forests.” (UN Department of Economic and Social Affairs). This reveals, that the SDGs tackle social, as well as global justice. They call for actions at the local, national, as well as global level. Moreover, this quote shows off how interwoven all these concerns are and that they cannot be assessed decently by just themselves.

## Conclusion

This paper highlighted the importance of clarifying what we consider to be just: it is about making sure people do not fall below the poverty line, ensuring the possibility of personal growth and the utilisation of opportunity, or is there something else? To push the question one level deeper: what are the assumptions made about reality that have led to these convictions: is the state and its stability the driving force, is it the anthropocentric wish for self-determination, or are there other grounds or foundations a concept of justice could be grounded on? Although both indexes reveal something of truth about the societies evaluated, it requires a good understanding of the index itself to understand the outcomes well.

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