

## Rethinking Luck Egalitarianism and Unacceptable Inequalities

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#### Introduction: luck egalitarianism.

Even a cursory glance around the contemporary world shows that some people lead miserable lives, and some people are far worse off than others. The first fact is surely morally undesirable. What should we say about the second? Inequalities in people's condition might be thought morally objectionable because they are bad in themselves or because they lead to other bads, or for both reasons combined. The last section of this essay explores what to say about inequalities that are instrumentally bad. The bulk of this essay explores whether, and if so, under what conditions, inequalities are noninstrumentally bad, bad in themselves.

A common thought is that even if inequalities in people's condition of some types are sometimes bad in themselves, the badness varies, depending on how the inequality comes about. Suppose that you and I start our lives equal in talents and material resources, and equally blessed with favorable socialization and education. In some obvious sense, our prospects are equal. Suppose also that we both face the same fair framework for interaction; for simplicity, just assume that is a well functioning private market economy, with initial ownership of goods and resources adjusted to satisfy egalitarian background standards. In this setting, you work hard and prosper, while I go in for cheap thrills, and squander my prospects. You end up well off and I end up far worse off than you. Surely how I came to be worse off than you affects the validity of my complaint that I am now suffering unequal prospects. Suppose redistribution occurs, so that the two of us start afresh again. Again, I squander my resources, and the cycle continues. At some point, many will think, enough is enough, and the moral requirements of equality of condition should not be interpreted as insisting on further equalizing redistribution. Moreover, some will think that point comes right at stage one, with my initial squandering of resources and falling on hard times. Some will think that I am reasonably held responsible for the outcome of my choices, so that when I court becoming worse off than others in this way, and inequality ensues, there is no case for transferring resources to restore equality of condition between you and me.

An approach to social justice theorizing prominent in recent decades seizes on the common thought illustrated in the previous paragraph. This way of thinking is known as "luck egalitarianism." At one time or another, Thomas Nagel, Ronald Dworkin, Larry Temkin, G. A. Cohen, and John Roemer have advocated versions of this doctrine.<sup>1</sup> Its recent critics include Marc Fleurbaey, Elizabeth Anderson, and Samuel Scheffler.<sup>2</sup> Luck egalitarianism can be encapsulated in a slogan: It is morally bad—unjust and unfair—if some are worse off than others, and morally good—just and fair—if all are equally well off. The injustice and unfairness of inequality are expunged if those who are worse off than others are so through their own fault or choice. Call this doctrine *strong luck egalitarianism*. A weaker doctrine holds that the injustice and unfairness of inequality are not entirely expunged, but lessened, the more it is the case that those who are worse off than others are so through their own fault or choice.

Luck egalitarianism has attracted many criticisms. Here I flag two criticisms, which strike me as weighty, and probably correct.

(1) The starting point idea that it is morally right or desirable per se that everyone's condition should be the same, is incorrect. Those who make this mistake may well be confusing a genuine bad that often accompanies inequality for a badness intrinsic to inequality. Often, when some are worse off than others, those who are worse off are very badly off, in absolute or noncomparative terms. It is bad for someone to be very badly off, regardless of how well or badly other people's lives are going overall. Some think it is especially bad if some people do not have a good enough quality of life, over their life course.<sup>3</sup> Some think that the worse one's life is going, in noncomparative terms, the more morally valuable it is to bring about improvement in one's life.<sup>4</sup> On either of these views, how well one is faring compared to others is not in itself morally significant, so whether one's condition is the same as that of others or not is not in itself morally significant.

(2) Luck egalitarianism is too harsh in the verdicts it renders regarding what is owed to people who have made bad choices and suffered bad luck and become badly off.<sup>5</sup> Our choices standardly will not certainly produce one outcome, but bring it about that we will get one or other of an array of possible outcomes, some more likely, some less. What then happens to us depends on the quality of our choices and also on the luck we have as to whether a more favorable or less favorable outcome, of those made possible by our choice, will occur. Example: suppose a young man makes an imprudent risky choice, say to drive a motorcycle fast in deserted terrain, without insurance. This is an imprudent choice, but of a type many of us make, and from which we escape without suffering any really bad consequences. Suppose this young man makes a bad choice and then has very bad luck, and ends up permanently disabled, unless we make some equalizing transfer of resources to enable him to get needed medical care. The young man is now worse off than others through his own choice, for which he is reasonably held responsible, so strong luck egalitarianism says that there is nothing unjust in the inequality he suffers, and no justice case for giving him the resources he needs for good prospects in life from this day forward. Against strong luck egalitarianism, the critic holds that a just society must provide further chances for people who choose badly but have very bad luck. Another version of this criticism says that even though the young man in the example chooses badly, the bad fortune he suffers is disproportionate to the badness of his choices that led to it. The young man suffers far worse fortune than he deserves.

#### **G. A. Cohen on luck egalitarianism and the socialist egalitarian ideal.**

In the face of such criticisms, some luck egalitarians retreat from the view, at least, from strong luck egalitarianism. The late G. A. Cohen's later thoughts on this topic are interesting because he retreats not at all and makes no concessions to the critics. If Cohen's defense of the luck egalitarian fort is successful, then maybe the rest of us should rally and hold the fort, and if his defense is unsuccessful, then maybe the luck egalitarian position should be abandoned as indefensible.

Cohen wrote an essay in 1989 that is a canonical statement of the luck egalitarian creed. His further thoughts occur in an essay defending the socialist ideal that was later published as a short book, *Why Not Socialism?*<sup>6</sup> In this work he describes an ideal camping trip among friends. For the duration of the trip, an all for one and one for all spirit prevails, and goods are not treated as private property but as resources to be shared for the benefit of all. From the example Cohen distills camping trip principles, the fulfillment of which on this imagined camping trip explains its attractiveness.

There are two principles. One is what Cohen calls “socialist equality of opportunity,” which is substantially the same as the norm I have called “strong luck egalitarianism.” This norm requires that no one becomes worse off than others due to the influence of factors that were beyond her power to control. If you lack native swimming talent or native talent necessary for acquisition of fishing skills, and as a result become worse off than others on the camping trip, that would be becoming worse off than others due to factors beyond your power to control. If you could choose to hike to the top of a peak, and enjoy a sublime view, or instead choose to stay in camp, and enjoy a less sublime view, and you stay in camp while others hike, the resultant inequality of condition is due to factors that lay within your power to control, so does not offend against socialist equality of opportunity. If you and others could choose either to swim with the sharks, fun but dangerous, or stay on the beach, boring but safe, and you all make choices and end up variously with (1) a great swim and no injuries or (2) a great swim and injuries or (3) no swim and no injuries, these inequalities in your resultant condition lay within each affected person’s power to control, so do not offend against socialist equality of opportunity.

The other principle that Cohen distills from the camping trip account is a principle of community, which is satisfied “when people care about, and where necessary and possible, care for, one another, and too, care that they care about one another.”<sup>7</sup> Community has two elements: one that I call “solidarity” and one that Cohen labels “reciprocity”. Cohen conjectures that we find his description of the ideal camping trip attractive because it exemplifies the fulfillment of the two principles of socialist equality of opportunity and community, and that in finding the camping trip attractive, we exhibit our latent allegiance to the socialist ideal. The camping trip is a small-scale venture, but according to Cohen scaling up the enterprise to society-wide social cooperation does not diminish its attractiveness, so we should favor organizing society on a socialist basis, on camping trip principles, if we continue to find the camping trip morally appealing after reflection, as we do. But the organization of society on camping trip principles may not be feasible, so Cohen’s conclusion is that we should endorse organizing society on socialist lines (according to camping trip principles) but only provided that it would be feasible to do so.

Cohen’s view is that strong luck egalitarianism is correct, regarded as a theory of social justice. But the correct account of social justice is not the entirety of the morality that should regulate the institutions and practices and individual conduct that we ought to put in place and sustain. Strong luck egalitarianism is correct as far as it goes, but it is incomplete, and needs to be supplemented by a further nonjustice principle (or maybe two principles, depending on whether we should count the solidarity norm and reciprocity norm that together constitute Cohen community as two distinct principles or as one two-aspect principle).

The bearing on Cohen’s suggestion on the two big objections against strong luck egalitarianism stated above is as follows. Regarding the claim that luck egalitarianism is too harsh in its verdicts regarding how to treat people who make bad choices and suffer bad luck, Cohen suggests that there is nothing unjust in declining to offer further help to such people, but morality nonetheless demands helping them. A principle of community that we ought to uphold requires us to help such people. Justice should be tempered with community.

Regarding the sweeping denial that equality per se is morally valuable at all, Cohen stands his ground, and insists that equality is morally valuable per se. He seems to be of the opinion that clarifying that justice does not require equality of condition, or even moves in that direction, at least when inequality arises from an initial equality via the voluntary choices of those who get the short end of the stick, enables us to see all the more clearly that equality of condition is nonetheless morally appealing, for its own sake. When we see equality plainly, out of the shadow cast by her elder sibling, justice, her appeal shines all the more brightly.<sup>8</sup>

Cohen's views on community are complicated, interesting, and ultimately puzzling. Much of this essay concentrates on disentangling the separate strands of his analysis and holding each one up to the light for assessment. It is hard to say whether his discussion of community provides support for his insistence on egalitarianism or rather just keeps repeating his insistence. In the end I incline to the latter view.

Before undertaking that further exploration of community, it is worth asking, does Cohen offer an intuitively plausible response to the two weighty criticisms of luck egalitarianism already noted above. Cohen keeps the faith. Is that admirable or dogmatic? In my view Cohen's response does not blunt the force of either criticism, and together their force against luck egalitarianism remains devastating.

The second criticism was that luck egalitarianism is too harsh in its implications regarding what we owe to individuals who court avoidable misfortune by their voluntary choices and end up getting bad luck and falling into deep trouble and subsequent grim life prospects. Cohen's response amounts to drawing a distinction. Justice, a stern virtue, requires that we compensate people for uncourted, not courted misfortune. If an uninsurable meteor falls on you and injures you, justice requires that the rest of us offer you help. However, if you encounter misfortune by a voluntary choice when you had available alternative reasonable courses of action, justice need not condemn your choice, but holds you responsible for the outcome in the sense that there is no further obligation that falls on the rest of us to make good the shortfall in your life prospects if any comes about via your voluntary choice. Nonetheless, in this latter case, you are now far worse off than the rest of us, and there is something morally untoward about leaving you to languish in your plight. "You made your bed, now you must lie in it" according to Cohen offends against an equality-oriented norm of beneficence, that calls on us to aid people to bring about good outcomes for people who would absent our aid be worse off than others.

This view is implausible. It might appear plausible if we restrict ourselves to a narrow range of examples, involving people who voluntarily gamble for high stakes and end up badly off if they lose the gambles. But there are other types of example. Consider a person who makes a morally admirable, reasonable, self-sacrificing choice to enter a burning building at cost to herself in an attempt to rescue people in dire peril. The hero might well end up badly burned, and left with miserable life prospects, as a direct result of her act. It is implausible to deny that it is unfair to leave the person languishing in her bad fortune, given its genesis.<sup>9</sup> My own view is that there is a clear justice case for compensation for the bad luck the person encounters on this rescue mission. Even if one does not agree that here justice requires compensation, one should admit that something is definitely wrong with Cohen's unblinking idea of justice, which treats the unlucky hero on a par with the person who negligently or recklessly takes a huge risk just for the thrill of it and ends up hurt, and with the person who has no urgent need for the resources high-

stakes gambling could bring but nonetheless gambles in hopes of striking it rich and instead ends up impoverished. These cases should not trigger a similar response at the bar of justice. So Cohen's response does not adequately deal with the problem initially posed.

Consider cases in which a person starts from a fair (equal) starting point, and makes a voluntary choice that brings about misfortune for her and leaves her worse off in life prospects than others. The person's decision might not count as fully voluntary if it is morally required, so confine attention to cases in which, if the person acts with the aim of benefiting others, this act is supererogatory, not strictly morally required. The quality of the person's decision might range from noble and admirable at one end of the scale to vicious and short-sighted at the other end of the scale. By the quality of her choice the person might register as more or less deserving. In her current plight, the person might be very badly off in life prospects in absolute terms, or not so badly off, all the way to extremely well off, if no further aid to alleviate her current plight is forthcoming. Also, the aid we might give the person in this situation might be variously favorable or unfavorable in terms of the ratio of (1) the gain that aid would bring to the person to (2) the loss that those providing the aid would have to incur. Moreover, the absolute value of the gain that further aid can provide the person might vary from enormous to piddling. These factors all should affect the issue, whether further aid to help the person who has landed in the ditch by his own voluntary choice is morally optional or required by justice. Cohen's luck egalitarian justice norm, socialist equality of opportunity, is too rigid and unbending and harsh in not being sensitive and responsive to these factors in its judgments as to what we owe one another.

Now turn to the first criticism of strong luck egalitarianism adduced above and the adequacy of Cohen's camping trip reply to it. The objection consisted in a flat denial that how one person's condition compares to that of another is noninstrumentally morally important and a fortiori a denial that whether one person's condition is equal to that of others is noninstrumentally morally important. The flat denial can be supported by appeal to a familiar argument, the leveling down objection.<sup>10</sup> Suppose we hold that equality is valuable for its own sake. Then we are committed to the idea that if we can bring about equality (or movement in the direction of equality) by worsening the condition of those who have more without making anyone else better off, and without bringing it about that those whose condition is worsened are now worse off than others, we must hold that at least in one respect the state of affairs just described is better than the one it displaces. The situation after leveling down is more equal, and equality (along with approaches to equality) is noninstrumentally morally valuable, so the situation after leveling down is in one respect morally better. There is always moral reason to bring about states of affairs that are morally better, so there is moral reason (not necessarily conclusive moral reason) to bring about greater equality by leveling down, given that doing this would in one respect make the situation morally better. But many of us, thinking about this type of case, balk at the idea that there is anything better in any respect about leveling down, and are then led to reject the idea that equality is noninstrumentally morally valuable at all.

The rejection of equality of condition of any sort as per se morally valuable is compatible with holding that it is morally more important to help persons obtain gains (or prevent them from suffering losses), the worse off they are, in noncomparative terms,

absent this help. That is to say, transferring a dollar from a well-off person to a homeless beggar, when the well-off person would lose one unit of benefit (well-being, say) and the homeless beggar would gain only one-half of a unit of benefit, might be to bring about a better outcome, one containing more moral value, given that greater moral value accrues to a person from receipt of a benefit, the worse off she would otherwise be. The suggestion then is that when we thought we valued equality as valuable for its own sake we were confused, and failed to notice that the prioritarian moral position just described can accommodate the conviction that helping the worse off matters more without subscribing to any claims to the effect that how one person's condition compares to that of another has any noninstrumental moral significance at all.

Cohen is not unaware of the arguments just canvassed. He nonetheless affirms the claim that equality of condition is per se morally valuable and, other things being equal, ought to be promoted. We have a stand-off of intuitions here. It should be noted that Cohen has no arguments on this point, just a firm insistence, so anyone who is initially inclined on the basis of the arguments just described to deny that equality has noninstrumental moral significance will find in Cohen's discussion no reason to change her mind.

### **Community: solidarity.**

Cohen has an elegantly simple response to the objection that strong luck egalitarianism, also known as socialist equality of opportunity, is too harsh in the verdicts it renders regarding what we owe to people who start with the same opportunities that others have but then make voluntary choices that give them worse prospects than others now face. His response is that on the ideal camping trip as he envisages it, people are disposed to help others when the others, left to languish, will be worse off than others. People have a disposition of community solidarity to aid others as just described. The solidarity impulse to help those who are worse off than others pays no heed at all to the character of the process by which those in peril of becoming worse off came into this peril. Maybe the people were heroically self-sacrificing, or selfishly greedy in gambling for profit, or recklessly imprudent, or lazy and hence imprudent, or came to their plight in some other way. No matter. Solidarity disposes one to help when people are worse off, and when this triggering condition is met, people do help, to restore equality of condition or at least make movement in that direction. So for example, the solidarity component of community will lead campers to fix a fellow camper's broken leg, at cost to themselves, restoring something close to equality of condition among all campers, even though the person's own negligence was the cause of the broken leg.

To illustrate the solidarity aspect of community, Cohen notes that if you, being poor, ride the bus every day to work while I, being rich, drive a sleek car, and then car trouble forces me one day to ride the bus to work, I can't complain to you how bad it is for me to have to take the bus today, and this shows absence of community between us.

I take it what Cohen has in mind here is that if I complain about my troubles when my troubles are far less than yours, because you are far worse off than I am, that would be untoward, and the reason it would be untoward is that if I had a robust community solidarity disposition, I would be moved to make you better off, at cost to myself, restoring something closer to equality of condition between us. Moreover, absent some special circumstance, such as my being even more moved to help instead someone even worse off than you, I would help you. And whether I helped you or another, in any case I

would no longer be driving a sleek car while you have to take the bus. Either we would both be driving inexpensive cars to work, or we would both be riding the bus, or the like. The key point here is not that it would be impolite, and show lack of sensitivity, if while my sleek car was being repaired and we were for once riding the bus together, I complained to you in particular about how terrible it is that I must today ride the bus. Imagining this unpleasant scenario just renders vivid the fact that I entirely lack a solidarity disposition and that this is morally bad.

There is an odd and mysterious feature of the solidarity disposition to help people that Cohen is embracing as part of community. The disposition Cohen discerns as driving the behavior of the people on his imagined ideal camping trip and as suggesting the right shape for the formulation of a fundamental moral principle for egalitarian society involves a disposition to help others just when doing so promotes equality of condition among members of the relevant group.

Suppose Bill Gates is very well off, and has already lived a life stuffed with more well-being than the vast majority of his fellow countrymen will ever attain. His sleek car is taking him to work, but unfortunately there is an accident, leaving Gates by the side of the road writhing in pain and sure to die soon if he does not get taken to the hospital immediately. I happen by and have an opportunity to help him: at small cost to myself I can bring it about that he enjoys many extra years of very good life. Any community solidarity disposition embedded in me will not be triggered by this situation if I understand the relevant facts. Gates will be far better off than others in lifetime well-being (and let us say also better off according to any other remotely plausible measure of being better or worse off), even if he dies by the roadside in the wake of the accident he has just suffered. Helping Gates will bring about a state of affairs that is worse, not better, from the standpoint of fostering equality of condition, if I help him. (To simplify the case, suppose that if I help him, I will then have to slip away in the crowd and be impossible to trace, so there is no possibility of Gate's compensating me fully for the losses I incur by helping him in his peril.) Community solidarity gives me no reason at all to help.

One might object that I have made my counterexample a rescue case, which may tug at our intuitions in irrelevant ways. But it would be easy to describe cases that make the same point but do not involve the drama of rescuing people from immediate peril. We simply imagine what is actually the case, that there are situations in which those of us who are far worse off than others have the opportunity to improve the lives of people who are better off, but any attempt to compensate us would incur administrative costs that would dissipate the benefit. Should we help or not? A prioritarian will say there should be some discounting of the gains to those who are already very well off at cost to those who are badly off. But it might well be that if we do provide the help, the small costs to us helpers are far outweighed by the great gains to the already very lucky recipients of our help, so that there is overall a very strong prioritarian beneficence reason to provide the needed help. Many other beneficence principles will reach the same verdict.

I submit that solidarity should rightly be interpreted as a beneficence disposition, and even if we modify this beneficence disposition by giving priority to helping a person, the worse off she would otherwise be, we should still endorse a solidarity disposition that will unequivocally recommend that it is morally desirable to help the better off in the example as described. Cohen's community solidarity oddly is silent here. The

differences between Cohen community solidarity and any solidarity disposition I would acknowledge to be morally attractive no doubt just reflect the importance Cohen attaches to establishing and maintaining everyone's having the same well-being or benefit level for its own sake.

In summary: Cohen proposes supplementing luck egalitarianism by a norm of community, which in its solidarity aspect disposes us to help people when doing so promotes equality. This supplement does not repair the defects already identified so far in luck egalitarianism. The Cohen hybrid view wrongly denies there is a fairness issue, when the question arises, should we give further help to people who made voluntary choices, good, bad, or ugly, that bring down misfortune on them. The Cohen community solidarity disposition wrongly limits its scope to helping others when that promotes equality, and heightens the concerns we should have that equality of condition is not per se morally valuable let alone a justice requirement. Even a responsibility-qualified norm of promoting equality is suspect.

**Community: reciprocity.**

Recall that the ideal of community in Cohen's vision of socialist egalitarianism has two components—one that he does not name, and that I have called “solidarity,” and another that he calls “reciprocity.” According to Cohen, when community obtains, people who interact are motivated by the reciprocal aim of serving others and being served by them. Being so motivated, each person prefers (1) I serve others and they serve me to (2) others serve me and I do not serve them. Each also prefers (1) I serve others and they serve me to (3) I serve others and they do not serve me. So the egalitarian reciprocity disposition that Cohen prizes is not an unconditional desire to cooperate with others whether or not they reciprocate; the egalitarian reciprocator does not willingly become a “sucker” who works to benefit others who lack reciprocal concern for him and are not disposed to return the favor.

Cohen characterizes the egalitarian reciprocity disposition just described as socialist reciprocity and contrasts it to what he supposes is the economic market norm of instrumental reciprocity. When instrumental reciprocity motivates people, one cooperates with others not with any ultimate aim of serving them but only in order to get served by them. Interacting with people who are like-minded, who are disposed to cooperate only to get gains for themselves, one behaves cooperatively just in order to get the benefits of the conditional cooperation of others. But all of us would prefer (2) others serve me and I do not serve them to (1) I serve others and they serve me. Cohen views a society whose economy is organized by instrumental reciprocity as a soulless place lacking genuine mutual feeling.

However, it is misleading to describe egalitarian reciprocity as an “antimarket principle.” Cohen writes, “Because motivation in market exchange consists largely of greed and fear, a person typically does not care *fundamentally*, within market interaction, about how badly anyone other than herself fares.”<sup>11</sup> But an economy organized around market exchange is organized around certain institutions and conventions. In a market economy, resources are privately owned, and freely made exchanges among the private owners determine the shape of economic activity. The institutional rules say nothing about people's motivation and the institutions will register whatever motives people bring to market exchange. Greed and fear can be motives that people bring to economic



activity whether its institutions are hunter-gatherer, modern capitalist, socialist, communist, or what have you.

This leads us to a point that Cohen would not deny. It is an open question what sorts of institutional arrangements in what circumstances would be most conducive to bringing it about that the ideal of community (encompassing solidarity and reciprocity) as he conceives it is fulfilled. For all that has been said so far, maybe what Cohen identifies as socialist community is best fulfilled, for people like us under conditions we are likely to face, when capitalist economic relations prevail. The economy is organized around market exchange among private owners of resources, with most economic resources being privately owned. If Cohen has resources for doubting this conjecture, the reasons are not contained in the characterization of the socialist community ideal.

### **Is communal reciprocity morally mandatory?**

Setting to the side the question of whether the institutions of a capitalist free market are inimical to the flourishing of communal reciprocity, we can ask whether communal reciprocity is morally mandatory or even desirable. Is lack of communal reciprocity per se a moral defect in a society?

The reciprocity idea is that when interacting with others, one wants both to serve them and to be served by them. Reciprocity can be indirect, as when I serve you, you serve another, that other serves someone else, and that fourth person serves me. It sounds appealing, but I doubt it is morally required.

Compare communal reciprocity with what we might call principled reciprocity, exemplified when, interacting with others, one wants to treat them and to be treated by them according to correct moral principles. Treating others morally might require any mix of serving and being served, depending on circumstances. Maybe I am very unlucky in life and you are very lucky, so that correct moral principles require that you serve me over and over, without my ever serving you. In principle I could be, according to correct moral principles, a basin of attraction of service, so that others always serve me and I always serve only myself. The principled reciprocity requirement on me in these interactions would be that I am disposed to treat all those serving me in the same correct way in which they should be treating me if the tables were turned and they were in my circumstances and I in theirs.

Principled reciprocity as I envisage it is an unconditional demand, to the effect that you should be disposed to treat others according to correct moral principles whether or not they are disposed to treat you according to correct moral principles. (Of course, correct moral principle may dictate different treatment of people, depending on whether or not they are behaving according to correct moral principles or disposed to behave according to correct moral principles.)

I do not say that there is a moral requirement that we should all strive to conform to principled reciprocity. Doing what is morally required according to correct moral principles may bring it about, perhaps frequently, that one becomes less disposed to treat others in future according to correct moral principles. Doing what is morally required might involve becoming someone's friend, and thus becoming disposed, to some degree, to favor the friend over others even when impartial morality dictates refraining from the favoring. Doing what is morally required might involve making an effective threat, and making the threat effective might require that one become disposed, and manifestly disposed, to act in some ways that morality forbids if the person to whom the threat is

issued should resist it. But principled reciprocity is surely a good rough guide to the education and training of dispositions, and better than communal reciprocity: if one wants to behave correctly according to correct moral principles, surely disposing oneself to do so will be a generally sensible means to the goal.

Denying that communal reciprocity of the sort Cohen espouses belongs in the statement of fundamental moral requirements and principles is not disparaging the idea. Reciprocity norms can enter moral thinking at several different levels; some norms that are not morally fundamental might be useful practical guidelines that can help to bring our conduct closer to fulfillment of fundamental norms. But Cohen seems to be trying to describe fundamental moral principles to which our institutions and practices and actions should conform. Communal reciprocity is not a plausible candidate for that status.

### **The value of community.**

Should we affirm the norm of communal caring? Right-wingers object that it would be wrong to extend the ideal of caring and concern among friends and close relatives to an ideal that all members of society should care for one another or more broadly that everybody should care about everybody. So stated, the objection might be that it is not feasible to arrange society so that everybody cares about everybody or the different objection that it would be undesirable so to arrange society even if it were feasible to do so. Cohen expressly maintains that once we separate the feasibility and the desirability issues, we should see that the universal extension of the ideal of brotherly and sisterly love would clearly be a good thing. As he observes, "I continue to find force in the sentiment of a left-wing song that I learned in my childhood, which begins as follows: 'If we should consider each other, a neighbour, a friend, or a brother, it could be a wonderful, wonderful world, it could be a wonderful world.'" <sup>12</sup>

In reply, let's stipulate that friends care about one another in this way: each has personal affection for the other based on acquaintance, each is disposed specially to favor the other in appropriate circumstances, and each is disposed in this way toward this person because she has affection for this person. We should grant that friendship is *per se* desirable, which means that friends caring about each other is *per se* desirable.

However, it does not follow that simply having care and concern for people as such, apart from particular acquaintance with them or liking of them or other special relation to them, is *per se* valuable. Suppose one could work up some generalized sentiment of concern for humanity as such or for the set of all persons. I do not see that attaining a component of friendship without the whole of it in this generally extended way would be *per se* valuable. Imagine that by great expenditure of resources on training and therapy we could induce everyone to have care and concern for everybody at least a bit. If this does no further good, the expenditure seems to me a waste of resources. If this is what considering each other, a friend, a neighbor, or a brother comes to, we should not embrace the ideal.

What about the idea that it would be wonderful if each person has care and concern about the particular persons with whom she is interacting? There is no special value in being disposed to be nice to the people one is interacting with rather than to distant strangers. Maybe what is at issue is an occurrent positive sentiment that shows itself in interaction. Sometimes this might be nice. But there is also a value in not being under a norm that dictates feeling personal care and concern for those one interacts with across the board. Conjuring up occurrent positive sentiments on the basis of particular

acquaintance takes time and energy, and it is a good thing, freedom enhancing and life simplifying, to be able to interact in a mutually beneficial way with lots and lots of people in an anonymous modern society without shedding one's anonymity. Freedom from caring (on the occasions when not caring has no tendency to worsen outcomes) is a freedom worth securing.

**“It could be a wonderful world”: Equality of condition as instrumentally valuable.**

So far I have been assessing the egalitarian ideal regarded as noninstrumentally valuable and indeed as noninstrumentally morally valuable. According to Cohen, we have moral reasons to bring about equality of condition across persons, for its own sake, not as a means to further worthy goals. I have tried to pour cold water on this position. Scratch the surface, and you will find that Cohen's arguments for equality reduce to insistence that morality demands it. From reasonable and plausible moral standpoints we can reject his insistence. Some of these alternative positions might be regarded as egalitarian in a loose sense. They hold that all beings with normal rational agency capacities are persons and all persons have equal basic dignity and worth and as such merit equal consideration. Equal consideration of persons requires building institutions and practices and selecting actions that bring about good quality lives for people, with good fairly distributed across people. There are various plausible ways to interpret “good fairly distributed across people,” but none requires equality of condition, everybody having the same or getting the same, in any respect.

Although Cohen holds that equality of condition is morally valuable for its own sake, independently of whether and how it helps or hinders the attainment of other goods, there are strong hints in his writings that he also has views on these instrumental questions. In fact, there is pretty obviously an implicit rumination in *Why Not Socialism?* that screams out the message that bringing about equality of condition, besides being morally desirable if feasible, would vastly improve our lives. Recall the socialist song whose thought Cohen endorses: “If we should consider each other, a neighbor, a friend, or a brother, it could be a wonderful, wonderful world, it could be a wonderful world.” The envisaged wonderful world is not just a world where moral requirements are fulfilled, duties satisfied, obligations met. The world which is run on camping trip principles, with institutions that achieve socialist egalitarianism, is a world in which we are all enabled to lead rich, happy, fulfilling lives, and in which we mostly do live such lives. The ideal camping trip is not merely one in which each camper fulfills all duties owed to other campers. The ideal camping trip is one that is great fun. Indeed, Cohen surely means to suggest, on the ideal camping trip we all have a great time in large part because the enterprise is organized on a basis of equal sharing and we all understand and appreciate that this is so.

Just what the relation is between the morally desirable and the nonmorally desirable is in my view left unhelpfully obscure in Cohen's discussion. He says that we should find the camping trip principles he proposes attractive, and an appropriate basis on which to organize our camping trips. Should we organize society on camping trip principles? Cohen says we should do so only if (and only if) that is feasible. By “feasible” Cohen does not mean that we should institute camping trip principles if and only if it is causally possible to do so. He means we should do so provided this would not result in excessive losses in terms of other values that rightly claim our allegiance. In

particular, socialism is not feasible if implementing it would lead to large inefficiencies in economic production and social cooperation such that we become less able to fulfill our valuable projects and aims, less able to lead good lives (a good life here being one that is good for the one that is living it). But this way of separating out what is morally desirable and what is desirable on other grounds such as grounds of collective prudence is mistaken, or so I would submit.

Whether people lead good, fulfilling lives is not some extra nice thing beyond the realm of morality: the essence of morality is that we owe one another good quality lives, fairly distributed. What Cohen shunts to the side of his discussion under the label of “feasibility” should be front and center in his discussion. Efficiency, not accepting states of affair that could be changed by making someone better off without making anyone else off, is a fairness concern; fairness indeed requires maximizing some appropriate function of good for people. The principles that Cohen distills from his camping trip model and identifies as principles of socialism are wrongly identified if they leave it as a matter of indifference whether people’s lives go better or worse, provided their condition is sustained at equality.

However, the points in the preceding paragraph, even if you accept them, leave important issues unresolved. I have been urging that the ideals of social justice and the fundamental principles of morality give a more central role to beneficence than Cohen allows. Whether or not that is so, the question remains: even if equality of condition is in no sense morally desirable for its own sake, it could still be instrumentally valuable. Establishing and sustaining (something close to) equality of condition might be instrumentally necessary or helpful for bringing about the fulfillment of the conditions that are the requirements of social justice. It might also be the case that establishing and sustaining (something close to) equality of condition might be instrumentally necessary or helpful for bringing about happiness among people or rewarding personal relations among people or other good things that in your view are nice but not elements of what is morally required. These instrumental claims might or might not be correct. Assume for the sake of the argument that they are correct. What follows? How would this affect the assessment of Cohen’s position?

The short answer is that of course these instrumental claims do not affect the merits of the case for holding or denying that equality of condition of any sort is *per se* morally required. Saying something is instrumentally valuable does not supply any sort of reason for holding it to be noninstrumentally valuable. Also, equally obviously, if some non-equality conception of social justice is correct, and implementing it requires introducing equality of condition, then implementing equality of condition is morally required as means to the moral goal. For example, suppose some prioritarian view is the correct fundamental moral principle and thereby the correct principle of social justice. Priority insists that how one person’s condition compares with that of any other and *a fortiori* whether one’s person condition is equal to that of another are of no *per se* moral significance. They are not morally valuable for their own sake. This leaves it entirely open that equality of condition of some sort might be just what we need as the means to achieving prioritarian justice.

Notice in passing that the leveling down objection does not apply to equality regarded as a means. Suppose that compressing the distribution of income and wealth would bring about greater well-being for worse off people and thereby more priority-

weighted well-being on the whole. Suppose compression is the best way to boost priority-weighted well-being. Then compression is morally required. Suppose that we are not able to transfer resources from rich to poor and can compress the distribution of income and wealth only by leveling down. Maybe the only thing we can do is burn down the mansions of rich people, with no gains in the income or wealth of anyone else. So be it. Burning down the mansions of rich people is then morally required. The assumption being made here is that doing so will have some further effect, perhaps by increasing social solidarity, or reducing the excusable envy of people, or increasing the access of poor people to positional goods, that will result in greater priority-weighted well-being gains than could otherwise be achieved. In this case, destroying the wealth of the rich would not be leveling down in the objectionable sense. Destroying the property of the rich would not be making some worse off without making anyone else better off.

There has been considerable empirical work in recent years on the broad topic, whether equality of condition of some sort does contribute causally to bringing about other significant goods. For example, social scientists have explored the question, whether increases in inequality of income and wealth among people causally contribute to worsening of the health of those people. The jury is still out, on the question, whether inequality of income or wealth does have the postulated bad effects.<sup>13</sup>

There is a broad plausible speculation that supports the hypothesis.<sup>14</sup> In the broad sweep of history, humans evolved to become the creatures we are in hunter-gatherer bands, with egalitarian sharing arrangements. When an animal is killed, all band members share in eating the meat. In post-hunter-gatherer forms of society, there is more hierarchical social organization, along with unequal distributive arrangements. These have their benefits, but human nature as currently evolved might include dispositions to dislike being bossed around by superiors in layered hierarchies and to dislike getting the short end of the stick when the benefits of economic cooperation are doled out. If these dispositions are continuously triggered in daily modern life and result in chronic stress and anxiety and other negative physical and emotional conditions, then perhaps the inequalities of status and resources that are endemic to modern life have bad consequences for our mortality and morbidity and more broadly for our well-being. Some of the conditions that generate these problems might be unavoidable, some not. Perhaps social policies that induce greater equality of condition of some salient sorts would yield consequences for human life that would be uncontroversially beneficial.

This is a plausible speculation, but it is a speculation, and as stated, painted too broadly to be a testable proposition. But there is surely a research program worth developing and pursuing. And who knows? Maybe the society that would be brought about by the public policies the culmination of this empirical research program recommends would resemble the society that Cohen recommends, one run on camping trip guidelines.

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<sup>1</sup> . Thomas Nagel, *Equality and Partiality* (New York and Oxford: Oxford University Press, 1991); Ronald Dworkin, *Sovereign Virtue: The Theory and Practice of Equality*

(Cambridge, MA: Harvard University Press, 2000); Larry Temkin, *Inequality* (New York and Oxford: Oxford University Press, 2000); G. A. Cohen, "On the Currency of Egalitarian Justice," *Ethics* 99 (1989): 906-944; John E. Roemer, *Equality of Opportunity* (Cambridge: Harvard University Press, 1998). See also Richard Arneson, "Equality and Equal Opportunity for Welfare," *Philosophical Studies* 56 (1989): 77-93; also Arneson, "Luck Egalitarianism—A Primer," in Carl Knight and Zofia Stemplowska. Eds., *Responsibility and Distributive Justice* (Oxford: Oxford University Press, 2011), 24-50.

<sup>2</sup> . Marc Fleurbaey, "Equal Opportunity of Equal Social Outcome?," *Economics and Philosophy*; Elizabeth Anderson, "What Is the Point of Equality?," *Ethics* 109 (1999): 287-337; Samuel Scheffler, "What Is Egalitarianism?," *Philosophy and Public Affairs* 31 (2003): 5-39. For responses, see Richard Arneson, "Luck Egalitarianism and Prioritarianism," *Ethics* 110 (2000): 339-349; Arneson, "Luck Egalitarianism Interpreted and Defended," *Philosophical Topics* (2004; actual date of publication 2006).

<sup>3</sup> . See Harry Frankfurt, "Equality as a Moral Ideal," *Ethics* 98 (1987): 21-43.

<sup>4</sup> . Derek Parfit, "Equality or Priority?," reprinted in Matthew Clayton and Andrew Williams, eds., *The Ideal of Equality* (Basingstoke: Macmillan Press Ltd., 2000)

<sup>5</sup> . See the example of Bert in Fleurbaey, "Equal Opportunity or Equal Social Outcome?"

<sup>6</sup> . G. A. Cohen, *Why Not Socialism?* (Princeton and Oxford: Princeton University Press, 2009). See also Cohen, *Rescuing Justice and Equality* (Cambridge, MA: Harvard University Press, 2008).

<sup>7</sup> . *Why Not Socialism?*, 34-35.

<sup>8</sup> . Besides the discussion in *Why Not Socialism?*, see also Cohen, "How To Do Political Philosophy" in his *On the Currency of Egalitarian Justice, and Other Essays in Political Philosophy* (Princeton and Oxford: Princeton University Press, 2011), 225-235.

<sup>9</sup> . Nir Eyal, "Egalitarian Justice and Innocent Choice," *Journal of Ethics and Social Philosophy* 2 (2007): 1-18. See also Richard Arneson, "Desert and Equality," in Nils Holtug and Kasper Lippert-Rasmussen, eds., *Egalitarianism: New Essays on the Value and Nature of Equality* (Oxford: Oxford University Press, 2006), 262-293.

<sup>10</sup> . The leveling down objection is stated by Derek Parfit in his "Equality or Priority?". He is somewhat noncommittal as to its probative force. For a thorough discussion by a whole-hearted advocate of the leveling down objection, see Nils Holtug, *Persons, Interests, and Justice* (New York and Oxford: Oxford University Press, 2010), chapter 7.

<sup>11</sup> . Cohen, *Why Not Socialism?*, 44-45.

<sup>12</sup> . Cohen, *Why Not Socialism?*, 51.

<sup>13</sup> . For instructive discussion, see Angus Deaton, "Health, Inequality, and Economic Development," *Journal of Economic Literature* 61 (2003): 113-158.

<sup>14</sup> . See Richard G. Wilkinson, *Mind the Gap: Hierarchies, Health, and Human Evolution* (London: Weidenfeld and Nicolson, 2000).