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Luck Egalitarianism and Relational Egalitarianism: An Internal Tension in Cohen's Theory of Justice

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Abstract: Relational Egalitarianism focuses on the construction of equal social relationships between persons. It strongly opposes luck egalitarianism, which understands equality as a distributive ideal. In Cohen's theory of justice, luck egalitarianism and relational egalitarianism simultaneously exist, and Cohen provides arguments corresponding to each. In this paper, we explore the manifestation of tension between these two forms of egalitarianism in his theory. In addition, we also reconstruct some possible solutions provided by Cohen to soften this tension, including the three approaches of market mechanism, egalitarian ethos and value pluralism, and find them to be unsuccessful. This tension is a serious challenge that needs to be addressed in Cohen's theory of justice.

Keywords: Cohen, luck egalitarianism, relational egalitarianism, market mechanism, egalitarian ethos, value pluralism

1 Introduction

In contemporary political philosophy, the differences between luck egalitarianism and relational egalitarianism are often debated. These theories hold different views on the value of equality—luck egalitarianism regards equality as a distributive ideal, whereas relational egalitarianism regards equality as a social relation ideal. However, we know that both luck and relational egalitarianism are components of Cohen's political philosophy. The disagreements between scholars regarding these two forms of egalitarianism challenge the coherence of Cohen's theory of justice. This paper focuses on the tension between the different forms of egalitarianism and is aimed at deepening our understanding of Cohen's theory of justice as well as the complexity of egalitarianism. The paper consists of four parts. In the first part, we examine the two forms of egalitarianism and their opposing views. The second part outlines the elements of luck egalitarian-

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ism and relational egalitarianism, as given in Cohen's theory, and the basic arguments provided by Cohen for these two egalitarian views. The third part constructs and presents the internal tension between the two forms of egalitarianism in Cohen. In the last part, we construct several possible solutions to solve the problem. We investigate three solutions—market mechanism, egalitarian ethos and value pluralism—and find them all to be unsuccessful. The argument presented in this paper reveals the inherent incoherence in Cohen's theory of justice.

2 Two Forms of Egalitarianism

The debate between luck egalitarianism and relational egalitarianism is a core issue in academia. Young (1990) was an early proponent of relational egalitarianism, but just as Lippert-Rasmussen stated, "it is probably fair to say that what really brought relational egalitarianism into spotlight of political philosophy was an article in *Ethics* by Elizabeth Anderson" (Lippert-Rasmussen 2018, 14). The term 'luck egalitarianism', which refers to a family of egalitarian theories of distributive justice aimed to counteract the distributive effects of luck, was first coined by Anderson and criticized from the standpoint of democratic equality (Anderson 1999). She later referred to democratic equality as 'relational egalitarianism' (Anderson 2015), which is a term that, nowadays, is more commonly used by scholars. Unlike luck egalitarianism, relational egalitarianism emphasizes the equal relationships among the members of a political society. The proponents of luck egalitarianism include Richard Arneson, John Roemer and Kasper Lippert-Rasmussen, and relational egalitarians, other than Elizabeth Anderson, include Samuel Scheffler, Jonathan Wolff, and David Miller.¹ The following section discusses the main points and basic differences of their arguments.

Luck egalitarianism expresses the basic moral belief that it is unjust if someone is worse off than others through bad brute luck, and it is not unjust if someone is worse off than others through bad option luck. The distinction between option luck and brute luck comes from Dworkin. Option luck is like a calculated gamble; for example, you might predict the price rise of some stocks and buy them to become rich, but your prediction might fail, potentially leading to bankruptcy. Brute luck is incalculable, such as a person getting cancer or walking down the street and being hit by flowerpots falling off balconies (Dworkin 2002, 73). Dworkin argues that fair distribution should be ambition-sensitive and endowment-insensitive, which implies that it should reflect one's personal efforts

¹ Since this paper focuses on Cohen, I do not list him in either camp here.

and not be affected by natural endowments. Luck egalitarianism adopts this distinction between option luck and brute luck as well as ambition and endowment. The core idea is to assume that there are inequalities in the advantages enjoyed by people, but as long as this inequality stems from people's voluntary choices, it is acceptable. However, an inequality is unjust if it stems from involuntary circumstances that affect people. These involuntary circumstances mentioned not only include the social class and family a person is born into but also their natural abilities and intelligence.

From this brief description, it's clear that luck egalitarianism is a responsibility-sensitive egalitarian theory, with the distinction between choice and chance being of fundamental importance. It is important to note that luck egalitarianism does not disregard all the consequences arising from brute luck. Rather, luck egalitarianism only aims to eliminate the inequality caused by brute luck and remains silent on the equality present due to brute luck. Therefore, it only deals with unjust inequalities and not unjust equalities. Let's consider the case of A and B who live on separate small islands. A is lazy and only harvests 1000 kg of corn this year, while B is diligent and harvests 1500 kg of corn. Due to sheer good fortune, a tornado brings 500 kg of corn to A, resulting in him having 1500 kg of corn. Luck egalitarianism would not consider A's gain of 500 kg of corn from brute luck, so it should be equalized. However, if both A and B put in hard work to harvest 1500 kg of corn each, and then the tornado brings A down to 1000 kg, A would be seen as worse off than B due to brute bad luck, with B having to compensate A. Of course, luck egalitarianism is also silent on the equality created by option luck. This is not to say, however, that luck egalitarianism aims to pursue equality; it is not opposed to inequality due to responsible choices. To sum up, the reason for luck egalitarianism being categorized as egalitarianism is that it is definitely against inequality, and the kind of inequality it is against is related to luck. The inequality caused by brute luck is opposed, but the inequality caused by an individual's calculated choice is not.

In contrast, relational egalitarians place greater importance on equal social relationships; i.e., the purpose of equality is not to distribute particular goods but to deal with human relations. Relational egalitarianism describes an ideal of social justice, according to which people ought to relate as equals. But how are people who relate as equals valued? This means their relationships do not display inequity in rank, power or status. Egalitarianism require basic social and political institutions to equally enable individuals to avoid domination and marginalization in their relationships. Domination here involves subjection to someone else's arbitrary exercise of power, and marginalization involves an unjustified denial of opportunities for certain people to participate in basic social and political institutions (Schemmel 2011, 366).

Relational egalitarians believe that the goal of egalitarianism is not to eliminate the impact of brute luck from human affairs; it is not about distribution but about creating a community where everyone is in an equal relationship. As a result, compared to luck egalitarianism's elimination of brute luck's impact on human affairs, relational egalitarianism places importance on ending social oppression and breaking of social ties among people. From this perspective, the value of equality is not based on luck and responsibility, but on oppression, privilege, and class solidification. On the other hand, regarding or treating others as equals means that people's claims against each other should be interpersonally justified. Justification is a matter of vindicating these claims. Therefore, equality is not a static state of affairs, rather, an ever-adjusting and complex interpersonal practice.

In reality, everyone has their own interests and will take actions to pursue them. But everyone has an obligation to justify their actions in accordance with principles accepted by others, and while making a joint decision, one person's interests should hold the same level of importance as another's. As free, equal and accountable persons, people take mutual respect, recognition, and reciprocity for granted (Scheffler 2015; Anderson 2015). Scheffler explains the nature of equality from three perspectives: moral, social and political,

“as a moral ideal, it asserts that all people are of equal worth and that there are some claims that people are entitled to make on one another simply by virtue of their status as persons. As a social ideal, it holds that human society must be conceived of as a cooperative arrangement among equals, each of whom enjoys the same social standing. As a political ideal, it highlights the claims that citizens are entitled to make on one another by virtue of their status as citizens, without any need for a moralized accounting of the details of their particular circumstances.” (Scheffler 2003, 22)

In addition, relational egalitarianism also includes an affective dimension which is largely ignored by scholars. Affective equality emphasizes the significance of love, care and solidarity, people relate to each other as equals, which implies that they should relate to each other in appropriately loving, careful and solidary ways (Baker 2015, 66).

It is clear from the above basic description of two kinds of egalitarianism that there are some fundamental disagreements between them. Although many scholars have discussed these disagreements (Anderson 1999; 2015; Moss 2014; Lippert-Rasmussen 2018), it is undeniable that Anderson's summary is the most comprehensive and influential. The following section focuses on three fundamental disagreements within these forerunners' research. At present, some scholars believe that these disagreements are superficial and the two kinds of egalitarianism are logically compatible or consistent (Tomlin 2015; Lippert-Rasmussen 2018; Miklosi

2018).² They think the dichotomy in the literature on equality is overblown. Here, we briefly respond to their objections.

Firstly, the core aims of the two types of egalitarianism are different. Their aims can be divided into negative and positive ones. The negative aim of luck egalitarianism is to eliminate the effect of bad brute luck, whereas relational egalitarianism is to eliminate the disadvantages of oppression, discrimination and unequal status. On the other hand, the positive aim of luck egalitarianism is the equal distribution of non-relational good among individuals, whereas relational egalitarianism is committed to creating a society of equals, i.e., a society in which all people are in equal personal relationships. Some might argue that it is wrong to set distributive equality against relational equality, because relational equality usually involves a distributive element (Tomlin 2015; Lippert-Rasmussen 2018; Miklosi 2018). It can't be denied that relational egalitarianism includes considerations of distribution and that distributive equality and luck egalitarianism include considerations of relationships. Almost all relational egalitarians acknowledge that distribution has instrumental value, but it is necessary to distinguish between distribution and distributive justice. Relational egalitarianism involves considerations of distribution, but this does not negate the fact that social equality and distributive equality are two fundamentally different ways of thinking. The distinction between consequentialism and deontology can be used as an analogy. The deontologist would acknowledge the importance of considering consequences in the moral sphere of life, and the consequentialist would acknowledge the importance of adhering to moral principles as well. However, deontology and consequentialism still remain different moral theories. In some cases, the consequentialist and deontological approaches may result in the same conclusion—for example, they both hold that stealing is wrong—but one cannot say that they arrive at the conclusions on the same basis. In fact, they have different justifying reasons for the same moral principle or rule.

Additionally, some radical projects even argue that relational equality can be reduced to distributive equality. Luck egalitarians might point out that we can reduce relational good to distributive good, such as by regarding status or authority as something that can be divided and redistributed or turning political or social egalitarian relations into one of the *distribuida* of justice (Gheaus 2016). However, as Scheffler stated, the egalitarian relationships are described by practical and deliberative terms rather than distributive terms. We cannot say that there

² Luck egalitarianism belongs to distributive egalitarianism. Although their projects mainly focus on reconciling distributive equality and relational equality, these egalitarians also apply to reconciling luck egalitarianism and relational egalitarianism.

should be an equal distribution on people's attitudes, motivations and intentions, which are expressed in reciprocal relationships. "The egalitarian aim is not to equalize the relevant attitudes and dispositions but to maximize them: to ensure that both parties exhibit them to the fullest." (Scheffler 2015, 31) This reduction strategy may further emphasize that relational egalitarians eventually become distributive egalitarians. For example, Anderson finally seemed to adopt a sufficiency stance when she made her own positive claims (Anderson 1999). However, although Anderson emphasized the significance of sufficiency, this is not a distributive ideal. She merely said that for all citizens to relate as equals, they should have a minimum amount of capacities. Therefore, sufficiency ultimately refers to social relationships here.

Secondly, the role of choice or responsibility is different in both positions. The idea of responsibility plays a fundamental role in luck egalitarianism; i.e., responsibility plays a decisive or prominent role in deciding how to distribute the good and when inequality is acceptable. Responsibility is, of course, important for relational egalitarians, but it is not the primary motivator of relational egalitarianism. Responsibility matters only if people are already able to regard and treat each other as equals in various ways. Responding to the accusations that relational egalitarianism would encourage irresponsible and imprudent conduct and, eventually, lead to the bankruptcy of the state, Anderson claimed that relational equality does not indemnify individuals against all losses due to their imprudent conduct, it only guarantees "a set of capabilities necessary to functioning as a free and equal citizen and avoiding oppression" (Anderson 1999, 327).

Thirdly, the most significant difference between luck egalitarianism and relational egalitarianism lies in their conceptions of justification. Luck egalitarians follow a third-person conception of justification, and relational egalitarians follow a second-person or interpersonal conception of justification. According to Anderson, third-person justification implies "someone presents a body of normative and factual premises as grounds for a policy conclusion. If the argument is valid and the premises true, then the conclusion is justified. The identity of the person making the argument and of her audience are irrelevant to the justification" (Anderson 1999, 22). Second-person or interpersonal justification implies that free, equal and reasonable people will make claims against each other, and the principle of justice regulates these claims, making them interpersonally justified. The difference in the conceptions of justification is also deeply reflected in the concept of an egalitarian deliberative constraint proposed by Scheffler, according to whom equal relationships should not be understood as distributive values, but that when people make decisions, each person accepts that the interests of another plays an equally significant role as their own. Scheffler stated,

“if you and I have an egalitarian relationship, then I have a standing disposition to treat your strong interests as playing just as significant a role as mine in constraining our decisions and influencing what we will do. And you have a reciprocal disposition with regard to my interests. In addition, both of us normally act on these dispositions.” (Scheffler 2015, 25)

Therefore, as a unique requirement of relational egalitarianism, the egalitarian deliberative constraint embodies the interpersonal conception of justification and not the third-person conception of justification. Whether the interpersonal conception of justification or egalitarian deliberative constraint, these scholars are concerned with the justice of agents, not the justice of state of affairs; they claim that the attitude, motive, disposition and deliberative ability of the participants, not special distributive models, are very important for social and political practices about human equality. This reflects a different perspective for understanding the principles of justice. As consequentialists, luck egalitarians believe that justice is achieved as long as some ideal distribution is achieved, and they care about the state of affairs. In contrast, relational egalitarians follow deontological thinking,³ claiming that justice involves the virtues of the agent, and “it is a disposition to treat individuals in accordance with principles that express, embody, and sustain relations of social equality” (Anderson 2015, 22). Whether the distribution of good is just depends on its ability to promote the construction of equal social relationships. This implies that the justice of state of affairs should be embedded in the ‘justice of agents’.

Some deny that there is a strict correspondence between the two types of egalitarianisms and two conceptions of justification. They believe that relational egalitarianism could be linked to third-person justification, and luck egalitarianism could be linked to second-person or interpersonal justification. Regarding luck egalitarianism, Vallentyne claimed that “there is an injustice only when those with more than their fair share of advantage fail to aid those with less than their fair share” (Vallentyne 2015, 47–48). This explanation emphasizes that the advantaged have an obligation to aid the disadvantaged, so “there is no barrier in principle to a luck egalitarian account of the duties we owe each other” (Vallentyne 2015, 45). Luck egalitarianism, thus, seems to be associated with second-person justification. However, Vallentyne could not deny the need to deal with distributive issues and aims to “make the distribution as good as possible” (Vallentyne

³ Anderson explicitly pointed out that luck egalitarianism follows consequentialist conception of justice: Anderson 1999, 31. Anderson did not clearly mention relational egalitarianism follows deontological conception of justice. Lippert-Rasmussen claimed that relational egalitarians subscribe to a deontological view, Lippert-Rasmussen 2018, 199) Anderson should not object to this view.

2015, 49). This indicates that he ignores second-person justification's facet of being grounded in a conception of persons as free, equal, mutually accountable. It is only when these persons are able to vindicate claims on each other that the resulting state of affairs is just. As Anderson pointed out, "there is no other route to defining a just state of affairs except through the concept of agents' compliance with reasonable claims people may make on each other" (Anderson 1999, 25). Lippert-Rasmussen argued that the reason for Anderson connecting luck egalitarianism with third-person justification is that luck egalitarianism condemns pure natural inequalities as unjust. However, Lippert-Rasmussen pointed out that pure natural inequalities are almost non-existent in real life, and "very few inequalities are likely not to be inequalities which reflect that someone, somewhere, and at some point in time, failed to comply with demands others could reasonably make on this person" (Lippert-Rasmussen 2018, 191). We think that this neglects to cut off the connection between luck egalitarianism and third-person justification based on practical relevance. As long as there are natural inequalities, in theory, and such inequalities are required to be eliminated by luck egalitarianism, it is difficult for this requirement to be interpersonally justified.⁴

3 Cohen's Two Egalitarian Positions

Cohen is often considered a luck egalitarian. His thoughts about "equal access to advantage" (Cohen 1989) and "socialist equality of opportunity" (Cohen 2009) express the core idea of luck egalitarianism. Cohen also advocated for the principle of community and showed a tendency towards relational egalitarianism. According to him, a community should be organized as a society of equals where people live without oppression and hierarchy, respecting and caring for each other. Before discussing how these two forms of egalitarianism result in tension within Cohen's system, it is necessary to explore the basic arguments that he developed for each.

Cohen first formally used the term 'luck egalitarianism' in a paper he wrote in response to Susan Hurley, wherein he stated, "since luck egalitarianism accounts it an unfairness when some are better off than others through no fault or choice of their own, the relevant contrasts with 'luck' is 'choice', complexly understood: other contrasts with luck, such as 'naturally determined', are simply irrelevant"

⁴ We acknowledge that Lippert-Rasmussen's criticism is much richer. Due to space limitation and to be consistent with Vallentyne's criticism above, we only choose the perspective of his attempt to cut off the connection between luck egalitarianism and third-person justification.

(Cohen 2011a, 119). In fact, as early as 1989, Cohen had clearly proposed and defended the basic idea of luck egalitarianism. Cohen believed that luck egalitarianism is the correct interpretation of egalitarianism, as its goal is to eliminate involuntary or unchosen disadvantages. Cohen stated, “in my view, a large part of the fundamental egalitarian aim is to extinguish the influence of brute luck on distribution. Brute luck is an enemy of just equality, and, since effects of genuine choice contrast with brute luck, genuine choice excuses otherwise unacceptable inequalities” (Cohen 1989, 931). These expressions convey that the distinction between choice and luck is a fundamental one in luck egalitarianism, and only the disadvantage caused by brute luck can be compensated. What does brute luck include? In his explanation of socialist equality of opportunity, Cohen divided brute luck into three components: First, the socially constructed status restrictions; second, the circumstances of birth and upbringing; and third, native differences. Socialist equality of opportunity treats inequalities that arise from the differences in talent and social environment as unjust. Therefore, Cohen’s egalitarian principle seeks to correct all involuntary disadvantages that the actors cannot be responsible for. As long as this is achieved, outcome inequality is also defensible (Cohen 2009, 16–19).

Cohen (Cohen 1989; 2011b) especially emphasized the concept of genuine choice, realizing that sometimes, people seem to make a choice, and this choice reflects an unchosen fact. Cohen’s acknowledgement of concepts such as choice or responsibility shows that he is not a determinist; he believes that effort is subject to will. On the problem of free will, Cohen seemed positioned between the no-luck view, which leaves little room for brute luck, and the all-luck view, which leaves little room for option luck (Hirose 2014, 51). In Cohen’s view, “the amount of genuineness that there is in a choice is a matter of degree, and egalitarian redress is indicated to the *extent* that a disadvantage does not reflect genuine choice” (Cohen 1989, 934, emphasis in original). Cohen could not offer a solution for determining the degree, but the debate between him and Dworkin on expensive tastes suggests that many choices are, indeed, not real choices but should belong to luck and circumstance.

The debate between Cohen and Dworkin was an internal debate on luck egalitarianism. As mentioned in the previous section, Dworkin had accepted the distinction between option luck and brute luck as well as ambition and endowment. According to Dworkin, egalitarians should care about the difference between preferences and resources, because preferences belong to the category of choice and resources belong to the category of brute luck, so there is no reason for preferences to be compensated. However, in Cohen’s view, egalitarians should be concerned about the difference between genuine choice and luck. We need to see if

the formation of preferences the subject should be responsible; if the subject is not responsible, then their preferences would also need to be compensated.

Cohen provided an example for the same: Consider two persons, Paul and Fred. Paul likes photography, and Fred enjoys fishing. While Fred easily pursue his own happiness, Paul can't afford the expensive equipment he requires, so Paul's life is much less enjoyable than Fred's. Paul could go fishing like Fred, but he hates fishing by nature, and photography is better suited to him. Cohen and Dworkin disagreed on the policy to take with Paul. Dworkin opposed funding Paul because his lack of enjoyment stemmed from his tastes, but Cohen believed that Paul's genuinely involuntary expensive tastes should allow him to be funded. (Cohen 1989, 923). Cohen later called tastes such as Paul's 'brute tastes' because they are not acquired by choice. If Paul had consciously developed this taste, it would be called judgmental taste, one which Paul would not wish to lack. Would Paul still be able to ask for compensation? In Cohen's view, judgmental taste, too, can be a reason to demand compensation. The equipment Paul would require to satisfy his photography taste happens to be expensive, which is a bad brute luck for Paul. The high price of equipment is circumstance that Paul has to deal with, and people can ask for compensation due to circumstance. Concurrently, if Paul already knew photography equipment to be expensive and still chooses to develop this taste, it is called 'snobbery taste'. Paul could have avoided this taste but he chose it although it is expensive. Here, the fact that Paul's taste is expensive is not mere bad luck. At this point, Paul's choice should be considered as a genuine choice, and so we have "a perfectly natural reason for hesitating to compensate him" (Cohen 2011b, 98). In short, according to Cohen's basic idea of luck egalitarianism, when egalitarians consider the problem of distribution, they should focus on the distinction between luck and genuine choice. Cohen believed that disadvantages derived from unchosen circumstances should be compensated, while disadvantages due to luck-negating choice or exercise of responsibility should not be compensated.

Cohen also explicitly supported the position of relational egalitarianism,⁵ which is particularly apparent in his elaboration of the principle of community. His thought of relational equality can be viewed from three dimensions: anti-hierarchy and anti-exploitation; respect and recognition; reciprocity and care. Cohen claimed that there should be no hierarchy and exploitation in healthy human relationships. In his famous camping trip, there would be no hierarchy among people. People would not be divided by class; they would all use the tools and divide the labor in a reasonable and equitable way. As far as possible, ev-

5 Tomlin 2015 and Lippert-Rasmussen 2018 both argued Cohen is a relational egalitarian.

everyone would roughly have the same chance to prove themselves. Cohen stated, “there are plenty of differences, but our mutual understandings, and the spirit of the enterprise, ensure that there are no inequalities to which anyone could mount a principled objection” (Cohen 2009, 4). Cohen also inherited Marx’s critique of capitalist exploitation. In his opinion, the capitalist relationship of exploitation does not talk about unfreedom of a specified individual; there is an ideologically valuable anonymity on both sides of the exploitative relationship. However, “the proletariat is collectively unfree, an imprisoned class” (Cohen 2011c, 162). On the surface, workers are free—free to choose which capitalist to sell their labor to. But they cannot choose not to sell their labor. In fact, they are forced to sell themselves. In Cohen’s view, a society with exploitation relationship is an alienated society and should accept moral condemnation.⁶

As a relational egalitarian, Cohen particularly paid attention to the construction of equal relationships and advocated that people should respect and recognize each other. He emphasized that those with a higher social status should regard and treat those with a lower social status as equals to ensure that everyone lives in a real community. Cohen provided his employer, the All Souls College of Oxford University, as an example, and described two groups of persons there: fellows and scouts. Fellows were those primarily engaged in academic research, and they usually have a high social status and decent job. Scouts mainly performed daily tasks, such as cleaning the room, receiving and sending letters, and were usually of a lower social status. Cohen described two contrasting ways in which his fellows viewed scouts in the college. One was to treat the scouts as waiters and pay them according to their service quality. The other was to see them as equals despite their lower social status and recognize them as being worthy of respect as fellows. Cohen stated that only fellows who adhere to the second way truly have an egalitarian spirit (Cohen 2013, 193–200).

Cohen observed that the dominant principles of the camping trip include the principle of socialist equality of opportunity and the principle of community. In Cohen’s view, the central requirement of community is “people care about, and where necessary and possible, care for, one another, and, too, care that they care about one another” (Cohen 2009, 34–35). This communal caring expresses reciprocal awareness of fellowship; its basic idea can be read as “I can’t be your friend without both you and I caring that I care about you and that you care about me” (Vrousalis 2015, 129). Cohen pointed out that communal caring consists of two models. The first is to curb inequality. Cohen claimed that, in luck egalitarianism,

⁶ Cohen’s critique of exploitation is not based on his luck egalitarianism, see Vrousalis 2015, Chapter 4.

socialist equality of opportunity permits inequality brought about by option luck. Although we cannot criticize this inequality by luck egalitarian justice, if the gap of inequality is large enough and the scope is wide, then it will still undermine the relationships among people, and, eventually, hurt the community. The rich and the poor would not be able to enjoy the full community. Cohen provided an example for the same. Consider that one person drives a comfortable car to work and another takes a crowded bus to work every day. If the first person's wife drives away with the car one day, he would have to take the bus like the second person. He could complain to his friends who drive to work every day about how terrible it is to travel by a crowded bus, but he wouldn't be able to directly complain to the second person because they lack a true community (Cohen 2009, 36).⁷

The second model is a communal form of reciprocity. Cohen compared communal reciprocity with market reciprocity. What prevails in a market is an instrumental relationship through which one gives because they get, but what prevails in a community is a non-instrumental relationship through which one gives because another needs it. Cohen has explicitly pointed out that "I mean, here, by 'community', the antimarket principle according to which I serve you not because of what I can get out of doing so but because you need my service. That is anti-market because the market motivates productive contribution not on the basis of commitment to one's fellow human beings and a desire to serve them while being served by them, but on the basis of impersonal cash reward." (Cohen 2011d, 217) The underlying motivation for these two kinds of reciprocity is completely different. The motivators of market reciprocity are greed and fear, while the motivators of communal reciprocity are fellowship and reciprocation. As per Cohen's understanding, the community principle is the principle that was not only proclaimed by Marx but also his socialist predecessors to be paramount to a good society, most profoundly embodied in 'from each according to his ability and to each according to his needs'. This slogan reflects the separation of contribution and earning; it does not imply someone should get more just because he produces more. Just as Vrousalis expressed, "in a society where human relationships are regulated by communal reciprocity, people can properly be said to constitute each other's need, and the emphasis is not just on how they *fare* but also on how they approach and treat each other. Fear and greed thus cease to be the dominant motives in their everyday lives and are replaced by dialogically acceptable mutual concern." (Vrousalis 2015, 111, emphasis in original)

⁷ Cohen also mentioned this example elsewhere, please see Cohen 2008, 36.

4 The Internal Tension of Cohen's Theory

This part is focused on the disagreements between luck egalitarianism and relational egalitarianism in Cohen's system, indicating that Cohen's theory faces an internal conflict. As a relational egalitarian, Cohen would assert that "justice is primarily concerned with the evaluation of states of the world, especially distributions, independently of the motivation or standing of the agents that bring them about" (Vrousalis 2015, 114). If Cohen's goal was only to achieve just distribution, it would be difficult for people to avoid isolation, humiliation and low self-respect. However, his relational egalitarianism requires people to mutual care for, respect and treat each other as equals. We can say that when Cohen is a luck egalitarian, he is hardly a relational egalitarian, and when he is a relational egalitarian, it is hard for him to insist on luck egalitarianism.

Some scholars have pointed out that luck egalitarianism often distorts the equal relationship between people. Anderson distinguished between the victims of bad option luck and bad brute luck and argued that luck egalitarians would not treat these victims with equal respect. According to the basic idea of luck egalitarianism, if people suffer from misfortune because of their own choices, they have no reason to ask for compensation. Anderson pointed out that many people in real life will suffer losses because of their own choices or faults, but one should not abandon them. For example, if a driver who does not want to buy medical insurance chooses to drive recklessly and, thus, injures himself, who is culpable for paying for his injuries? Does one let him die on the side of the road because he doesn't have insurance? Once he is given emergency treatment and his life is saved, is it necessary to let him continue to receive medical services? Anderson pointed out that according to the logic of luck egalitarianism, victims of bad option luck, like the driver voluntarily taking the risk, deserve their misfortunes and society need not to provide them with aid (Anderson 1999, 295). Cohen seems to have touched upon this issue in his dispute with Scanlon. According to Scanlon, choice, as the true origin of preferences, is not relevant to whether a person's needs should be satisfied, but Cohen believed that choice is an important factor. In Cohen's opinion, when people are disadvantaged because they consciously develop certain preferences, one can only help them out of charity, but not out of justice (Cohen 1989, 940). In Anderson's example, reckless driving can be seen as a deliberate adventure preference. At best, Cohen admitted that we should help the reckless driver out of charity but not out of (luck egalitarian) justice. However, this response may misinterpret the meaning of Anderson's objection. Anderson was not talking about whether luck egalitarians can help reckless victims on other grounds, but that luck-egalitarian principles are incompatible with the ideal of a

society of equals, and they cannot reflect the nature of justice. Anderson's challenge seems to remain valid.

There are also those who are victims of bad brute luck. Luck egalitarianism believes that the disadvantages suffered by these people are caused purely by accidental luck and, therefore, should be compensated. Anderson argued that although the state approves of helping these people, but it shows disrespect for them. The state labels people according to their natural defects, categorizing them as disabled, stupid, incompetent, ugly, or socially phobic. To some extent, the state seems to require some citizens to show evidence that they are inferior to others, and the citizens get help from the state by demeaning themselves. If the disadvantaged demand compensation because they are deemed as inferior to others, the attitude expressed by the advantaged to offer compensation is that of pity, and such humiliating help is at odds with the spirit of respecting others (Anderson 1999, 305–306). Anderson's criticism was easily refuted by Knight who pointed out,

“they (redistributive decisions) are made from the impartial perspective of the state, a perspective which represents the interests of all its citizens, advantaged and disadvantaged alike. Redistribution is performed out of respect for the fundamental equality of all persons that transcends the vagaries of particular unchosen circumstances. The recognition and tackling of inequalities in these circumstances are solely for the purpose of securing the fundamental equality of those individuals. This is a matter of justice, not pity.” (Knight 2009, 135)

We believe Knight's objection is correct. If the state has a subjective attitude like natural persons, the state's attitude when seeking to compensate people their bad brute luck would be based on the pursuit of equality and respect for all, and it will never be a humiliation. However, we think that pity and humiliation should be understood from the perspective of the recipients and not the donors. Anderson was ambiguous on this point. In fact, the concept of shameful revelation given by Wolff can help us understand the nature of pity and humiliation,

“there are be cases where people are required to demean themselves: to behave in a way, or reveal things about themselves, which can rationally be expected to reduce their respect-standing. To put this another way, sometimes people are required, for whatever reason, to do things, or reveal things about themselves, that they find shameful.” (Wolff 1998, 109)

If these objections are true, it would be difficult for Cohen, as a luck egalitarian, to move toward his conviction of relational egalitarianism. Similarly, Cohen as a relational egalitarian can hardly insist on luck egalitarianism. Luck egalitarianism is inspired by certain intuitions about fairness; this approach does not presume that equality is fair and inequality is unfair. Luck egalitarians recognize that in-

equality caused by people's choices and ambitions is acceptable and fair, and it is unfair to eliminate such inequality. It implies that luck egalitarianism and great inequalities can coexist. The problem is that when the inequalities reach a certain level, they will inevitably destroy human relationships. Those who work harder will have greater power and dominate and oppress the disadvantaged; they could not respect and recognize each other to construct a community of solidarity. Cohen believed "certain inequalities that cannot be forbidden in the name of socialist equality of opportunity should nevertheless be forbidden in the name of community" (Cohen 2009, 37). When relational egalitarianism adjusts and curbs this inequality, it actually disintegrates the distinction between luck and choice that luck egalitarianism consistently adheres to.

One idea that relational egalitarians can agree on is that people have the right to redistribute the benefits from individual efforts and choices. Imagine a lazy man who would rather enjoy his leisure time than work for a larger income. He chooses low-paid and less demanding jobs or no jobs at all. Without a doubt, he will be financially worse off than those who work harder. But according to relational egalitarianism, those who benefit from their own hard work should not be exempt from redistribution, and those who suffer from poverty due to laziness or short working hours cannot be abandoned and left to perish. As a luck egalitarian, Cohen should not condemn inequality as the result of option luck. However, as a relational egalitarian, Cohen should help those who are worse off, even if it is because of their own lack of efforts. Just as Scheffler realized,

"the aim of enabling people to be fully cooperating members of society provides an independent standard for judging which disadvantages should be compensated. By this standard, some disadvantages should be compensated even if they result from bad 'option luck', whereas other should not be compensated even if they result from bad 'brute luck'." (Scheffler 2003, 30)

Cohen sometimes used the story of grasshoppers and ants from *Aesop's Fables* to explain that fair distribution should take into account the effect of hard work. In the story, grasshoppers and ants have different destinies, which proves that luck egalitarianism can reflect people's intuition about ants' efforts. However, he was clearly aware of the importance of fraternity egalitarianism, having stated "this fraternity-based egalitarianism depends on the claim that significant divergences in people's fortunes discourage community" (Cohen 2011a, 120).⁸ In Cohen's view,

⁸ In Cohen's context, we treat principle of community, relational egalitarianism and fraternity egalitarianism as synonymous. In section two, we have demonstrated why the principle of community is relational egalitarianism. From this quotation, we also can see that fraternity egalitarianism is consistent with the principle of community.

fraternity-based egalitarianism is sensitive to the huge wealth gap between people, which hinders the formation of a community. This egalitarianism does not focus on distribution, so it will not focus on the question of fairness. However, luck egalitarianism emphasizes, “not being inspired by intuitions about fairness, fraternity-based egalitarianism might ignore the criticism that unmodified equality is unfair because it provides the same benefits for the idle grasshopper as it gives to the industrious ant” (Cohen 2011a, 120). In a sense, this also shows that Cohen, as a relational egalitarian, was discontented with the plausibility of luck egalitarianism.

5 Several Possible Solutions

Through the above, we have roughly shown both luck egalitarianism and relational egalitarianism are present in Cohen’s theory of justice, resulting in potential tension within his system. Luck egalitarianism permits inequalities through option luck; however, a great scale of inequalities will eventually destroy a community. Therefore, a potential tension exists between realization of distribution and realization of community. So how did Cohen soften this tension? The following is a summary of some possible solutions based on his scattered expressions. Cohen could offer three reconciliatory projects: market mechanism, egalitarian ethos and value pluralism. It is worth noting that these three projects represent different levels of reconciliation. Market mechanism represents an institutional solution to the potential tension, egalitarian ethos would resolve it at the level of individual motivation, while value pluralism would offer a principled response.

Since luck egalitarianism is in conflict with relational egalitarianism, the immediate response is to abandon one of them and keep the other. Miller once suggested that Cohen should abandon luck egalitarianism because luck egalitarianism itself is an inconsistent theory. On the other hand, Cohen’s political beliefs align with radical socialism, and his commitment to luck egalitarianism does not reflect his deep beliefs about justice and equality (Miller 2015, 131–135). Although Cohen, as a Marxist, has a deep love of socialist ideals, he has always paid close attention to people’s efforts and responsibilities. After all, the intuitive power of stories about grasshoppers and ants is too strong. Cohen believes a proper understanding of the ideal of equality demands a responsibility-sensitive egalitarianism; it is fair for grasshoppers and ants to accept their different ending. Therefore, it is difficult for us to imagine that he would completely abandon one side. Cohen pointed out,

“the fraternity egalitarian may make various responses to the unfairness objection. She might say that she does not care about fairness, or that she thinks it’s a confused concept. But she might also acknowledge the force of the objection, and propose a trade-off between fraternity and fairness. She might then allow responsibility-induced inequalities, within the limits of an imperfect but tolerably robust preservation of community.” (Cohen 2011a, 120)

This compromise is more formally stated in his small book, *Why not Socialism?* What kind of solution does Cohen offer in this book? He examines the first market mechanism, an economy system designed by Joseph Carens and also called Carens scheme (Cohen 2009, 65). This scheme combines a standard capitalist market with the tax system. On the one hand, it preserves the information function of the market; i.e., the market decides what to produce and how to produce it. On the other hand, it extinguishes the normal motivational presuppositions and distributive consequences; i.e., the state equally redistributes the income through the taxation system and eliminate the income inequality caused by the market. This guarantees that the income levels of all people are equal (Cohen 2009, 63–65). The Carens scheme aims to fully realize egalitarian post-tax distribution of income. The problem with this scheme, according to Cohen, is that it relies entirely on non-self-interested choice. In fact, on the other hand, we can see that the taxation not only eliminates the inequalities from brute luck but also from option luck. The Carens scheme seems to negate the significance of luck egalitarianism in social practice.

Furthermore, Cohen also examined the second market mechanism—market socialism. In market socialism, there are no capitalist classes, and workers themselves are the masters of the firms and own the firms’ capital. In Cohen’s mind, this market is superior to the pure capitalist market. However, with the existence of the market, market socialism should admit to the inequalities between winners and losers created due to luck. Cohen emphasized that market socialists should recognize the market is intrinsically repugnant for producing undesirable effects, such as significant unjust inequality. Meanwhile, market socialism deviates from relational egalitarianism and cannot reflect true reciprocity. Cohen himself admitted from a socialist point of view that,

market socialism nevertheless remains deficient from that point of view, because, by socialist standards, there is injustice in a system that confers high rewards on people who happen to be unusually talented and who form highly productive cooperatives. Market socialism is also a deficient socialism because the market exchange that lies at its heart tends against the value of community.” (Cohen 2009, 74–75)

Therefore, market socialism cannot guarantee that luck egalitarianism and relational egalitarianism are in harmony and has to face challenges from both sides.

Cohen also tried to reconcile this issue by proposing an egalitarian ethos. In his view, an egalitarian ethos does not value the benefits that come from the differences in talent and is even wary of the inequalities from people's efforts. A just society not only requires coercive rules but also an ethos of justice that informs individual choices. If a just society would tax away the surplus and redistribute it equally, then a relevant effect of the egalitarian ethos is to induce agents to accept the high rates of taxation and other charitable activities. When Cohen discussed the curbing of inequalities brought about by socialist equality of opportunity, he largely resorts to depending on the kindness and mercy of the rich, "in our unequal world the rich should sacrifice to help the poor. But how much should they give up? There is a level of sacrifice so modest that the rich could not reasonably refuse it, and a level so high that the poor could not reasonably demand it." (Cohen 2011e, 204)

The realization of the principle of community here seems to be completely on a personal level. It may be related to his view of 'the personal is political', by which Cohen criticized Rawls for seeing the basic structure of society as the domain of justice. In *If You're an Egalitarian, How Come You're So Rich?* Cohen also made it clear that, in unequal societies, if the rich keep their money, they cannot be egalitarians or truly believe in equality. Therefore, according to Cohen, if the rich are to be coherent egalitarians, they should donate their extra wealth, directly transfer it to the disadvantaged, or shift their efforts toward activities that benefit those who are worse off (Cohen 2000, 148–179). This is why Cohen has emphasized the egalitarian ethos. The main target of this ethos is the rich or the advantaged population. The more popular egalitarian ethos in a society is, the more the rich will redistribute their wealth and the more equal this society will be.

In fact, it is not realistic for Cohen to lay his hope on the egalitarian ethos. Kukathas pointed out that today's society is unfavorable to the prevalence of the egalitarian ethos because of its wide geographical space and high diversity. Kukathas stated,

"a large entity like a state might simply be too large for its members to feel they share any deep bonds with distant strangers. States are also typically made up of regions to which people feel separate loyalties, which may make it doubly difficult to establish an ethos of statewide egalitarianism, even if people are regional or local egalitarians." (Kukathas 2015, 245)

Moreover, the society conceived by Cohen within which the egalitarian ethos generally operates is essentially a utopia that assumes everyone will align with the egalitarian ethos. However, the real world is far more complicated. In a situation where people interact with each other, any normative theory offering advice on what to do will need to take into account how people behave in that situation.

Schmidtz pointed out that we are political animals and live in a strategic world. Others will treat our choices as part of their circumstances and respond accordingly,

“we choose well only if we choose with a view to what we thereby give others a reason to do in response—that is, only if we do not take others for granted, do not treat them as pawns, and do not treat them as if they have a duty to be gripped by whatever vision is gripping us at the moment” (Schmidtz 2017, 131).

Lastly, it is worth noting that Cohen sometimes seemed to position himself with value pluralism to integrate luck egalitarianism and relational egalitarianism, which can also be regarded as reconciliation to some extent. There are two different understandings of Cohen’s value pluralism—he could have been a pluralist about value in general or a pluralist about justice.⁹ Cohen sometimes believed that there are various values or moral ideals in human society, and justice is only one of them, “justice is not the only value that calls for (appropriately balanced) implementation: other principles, sometimes competing with justice, must also be variously pursued and honored” (Cohen 2008, 271–272). Cohen also believed that value pluralism may be internal to justice and that the community represents another component of egalitarian justice. As previously mentioned, Cohen claimed that fraternity egalitarianism is present in addition to luck egalitarianism. He also explicitly pointed out that there are at least two different types of justice: justice as fairness and justice as legitimacy. He argued that option luck only can preserve justice as legitimacy and not justice as fairness (Cohen 2011f).¹⁰

There was also a change in Lippert-Rasmussen’s understanding of Cohen’s value pluralism. In his 2016 book, he stated that Cohen’s community is a value different from equality or justice, as there are many other values apart from them, such as freedom and stability (Lippert-Rasmussen 2016, 209–239). In his 2018 book, he expressed that Cohen’s luck egalitarianism and community are part of egalitarian justice (Lippert-Rasmussen 2018, especially chapter 7). If we regard Cohen as a pluralist about value in general, the following question would arise: “how community as a non-justice value might limit justice” (Gilbert 2012, 107). Responding to whether restricting inequality in the name of community is also an injustice, Cohen only said, “I do not know the answer to that question. (It would,

⁹ Thanks to a reviewer who reminded me of this.

¹⁰ It is important to note that Cohen’s use of fairness is rather ambiguous. Here, he claimed that fairness is inconsistent with luck egalitarianism and emphasized that fairness is a state of equality. However, he sometimes claimed that luck egalitarianism is consistent with fairness and emphasized that equality is not necessarily fair and inequality is not necessarily unfair (Cohen 2011a, 120).

of course, be a considerable pity if we had to conclude that community and justice were potentially incompatible moral ideals.)” (Cohen 2009, 37) Therefore, when we discuss Cohen’s value pluralism in this paper, he is primarily considered as a pluralist toward justice or pluralist egalitarian. As a pluralist egalitarian, he believed that egalitarian justice consists of both the distributive and relational component. Another point of mention here is that the ambition of the author here is not to defeat value pluralism in general sense; human society includes many values that are difficult to reconcile, such as freedom and equality. Justice also has many elements, and there is no master principle through which an element wins in every context (Schmidtz 2006). Our aim here is to demonstrate that Cohen’s value pluralism project does not help him to resolve the tension between luck egalitarianism and principle of community, and when he tries to balance different moral considerations with the domain of justice, he had to face other difficult questions.

Cohen responded to Anderson’s criticism of luck egalitarianism,

“Elizabeth Anderson’s broadside against the ‘luck-egalitarian’ view of justice highlights the effect of striving to implement the luck-egalitarian principle without compromise, but difficulties of implementation, just as such, do not defeat luck egalitarianism as a conception of justice that it should always be sensible to strive to implement it, whatever the factual circumstances may be.” (Cohen 2008, 271)

Therefore, for Cohen, luck egalitarianism was a *pro tanto* principle of justice. To understand how to implement it in specific circumstances, he would need to weigh it against other *pro tanto* principles of justice. The principle of community, as a relational egalitarianism or fraternity egalitarianism, limits the application of luck egalitarianism. But how does the principle of community play regulative role in Cohen’s theory? Since Cohen, as a polemical philosopher, always spent more time critiquing others than defending his own views, we could not find a clear answer. Gilabert mainly connected the principle of community with sufficientarian concerns with basic needs (Gilabert 2012). However, sufficiency was too low for Cohen as it allows huge inequality to exist and not achieve justice. Cohen offered an example about a deliberate gamble. Two people start out equally placed, with \$100 each, and relevantly identical in all respects. They flip a coin. One gives the other \$50 if it comes up heads, and vice versa. The first person then ends up with \$150 and the other with \$50 (Cohen 2009, 30–31). Let us further assume that, according to the price level, \$50 is enough to guarantee one’s basic needs and ensure that citizens can function as equals in a society. If the principle of community is merely a sufficiency theory, we must remain silent on the inequality between the two people. However, in Cohen’s view, although the inequality is consistent with luck egalitarianism, the principle of community

will still object to this inequality. To guarantee that people stand in relations of equality with each other, the principle of community would demand a high level of redistribution. However, the problem here is, if the inequality created by luck egalitarianism should be regulated by implementing high level of redistribution, it will make luck egalitarianism become irrelevant in practice. In addition, how would this high level of redistribution be implemented—through coercive or voluntary measures? Just as King argued, if the redistribution is voluntary, it would not guarantee imprudent people sufficient resources to avoid deprivation; if it is coercive, it would require unjustified restrictions on liberty. According to King's view, Cohen's community constraint is most plausibly specified as requiring enforcement of sufficiency and only voluntary equalization thereafter (King 2018). This understanding makes Cohen's principle of community very mysterious—it not only works at different levels but also in different ways. In short, it seems that, for Cohen, value pluralism does not really work as a reconciliation approach.

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