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MARXISM

The standard left-wing critique of liberal justice is that it endorses formal equality, in the form of equal opportunity or equal civil and political rights, while ignoring material inequalities, in the form of unequal access to resources. This is a valid criticism of libertarianism, given its commitment to formal rights of self-ownership rather than substantive self-determination. But contemporary liberal egalitarian theories, like those of Rawls and Dworkin, do not seem vulnerable to the same criticism. Rawls does believe that material inequalities (under the difference principle) are compatible with equal rights (under the liberty principle), and some critics take this as evidence of a lingering commitment to formal equality (e.g. Daniels 1975a: 279; Nielson 1978: 231; Macpherson 1973: 87–94). But the inequalities licensed by the difference principle are intended to promote the material circumstances of the less favoured. Far from neglecting substantive self-determination in the name of formal equality, the difference principle is justified precisely because ‘the capacity of the less fortunate members of society to achieve their aims would be even less’ were they to reject inequalities which satisfy the difference principle (Rawls 1971: 204). To oppose these inequalities in the name of people’s substantive self-determination is therefore quite misleading.¹

Given this shared commitment to material equality, do socialists and liberal egalitarians share the same account of justice? For some strands of socialist thought, the answer is yes. There seems to be no deep difference between Dworkin’s liberal theory of equality of resources and various socialist theories of ‘compensatory justice’, which also aim at an ambition-sensitive, endowment-insensitive distribution (e.g. Dick 1975; DiQuattro 1983; cf. Carens 1985).² Similarly, there seem to be no deep differences between liberal accounts of a ‘property-owning democracy’ or ‘stakeholder society’ and various models of ‘market socialism’, which also aim at greater equalization of ownership of productive assets while still relying on markets for the distribution of goods and services.³

However, there are other strands of socialist thought which move in a different direction. I will discuss a few such strands in this chapter, drawn

from recent Marxist writings. With the discrediting and eventual dissolution of communist regimes in Eastern Europe, it is often said that Marxism is now ‘dead’, relegated to the dustbin of history, like older theories of theocracy, feudalism, or absolutist monarchies. Surprisingly, however, the death of communist regimes in the East has gone hand in hand with a rebirth of Marxist theorizing in the West. Marx and Marxism were more or less entirely ignored by Anglo-American philosophers for most of the twentieth century (Ware 1989: 1–2). In the last twenty years, however, there has been an outpouring of writings on Marxism, and attempts to reformulate Marxian theories. This movement is often known as ‘analytical Marxism’, since its proponents aim to reformulate Marx’s insights using the tools and methods of contemporary Anglo-American analytic philosophy and social science.

This process of ‘reformulating’ Marx has of course been a selective project. Many of Marx’s beliefs and predictions have been soundly refuted, and very few people would want to defend his corpus *tout court*. In particular, few analytic Marxists wish to defend Marx’s theory of history, known as ‘historical materialism’. According to this theory, the development of human societies is determined by class struggle, which is itself determined by the development of the means of economic production, and the inevitable result of this development is the revolutionary overthrow of capitalism by the proletariat. Capitalism would be replaced first with socialism, and eventually, once abundance has been achieved, with full-blown communism.

Few analytic Marxists today believe in the inevitability of proletarian revolution. Precisely for this reason, however, it has become more important for Marxists to clarify the normative basis of their commitments to socialism or communism. When Marxists believed that socialism was *inevitable*, there was no need to explain why it was *desirable*. It was simply the end point of a predetermined sequence of historical developments. Capitalism would self-destruct, due to its inner contradictions, and the increasingly immiserated workers would have no choice but to overthrow it. Economic contradictions, not moral arguments, would underlie the revolution.

Marx and Engels were in fact quite scathing about theorists who tried to give moral arguments in favour of socialism. Moral arguments were seen as both unnecessary, since workers had no rational alternative to revolution, and strategically divisive, since the idea of justice is endlessly contestable. Moreover, defenders of capitalism had already crafted elaborate ideological justifications for the freedom and equality of capitalism. Shifting the debate onto the terrain of moral argument would allow these ideologists of capitalism to distract the workers from their task of revolution.

Today, however, Marxists realize that if socialist or communist ideals are to be implemented, it will require persuading people that these ideals are morally legitimate, and worth pursuing. Far from being increasingly immiserated,

many workers have experienced an increasing standard of living, and often vote for political parties committed to capitalism. If socialist parties are to succeed, arguments must be given why a socialist society would be more desirable—more free, just, or democratic—than the sort of welfare state capitalism we see today. And indeed much of the work in contemporary analytic Marxism has been concerned precisely with developing these sorts of normative arguments.

In other words, the death of 'scientific' Marxism as a theory of historical inevitability has helped give birth to Marxism as a normative political theory.⁴ A fundamental goal of the new analytical Marxism is to offer a critique of, and alternative to, liberal theories of justice.

In this chapter, I will look at two strands of critique. One strand objects to the very idea of justice. Justice, on this view, is a remedial virtue, a response to some flaw in social life. Justice seeks to mediate conflicts between individuals, whereas communism overcomes those conflicts, and hence overcomes the need for justice. The second strand shares liberalism's emphasis on justice, but rejects the liberal belief that justice is compatible with private ownership of the means of production. Within this second strand, there is a division between those who criticize private property on the grounds of exploitation, and those who criticize it on the grounds of alienation. In either case, however, Marxist justice requires socializing the means of production, so that productive assets are the property of the community as a whole, or of the workers within each firm. Where liberal-egalitarian theories of justice try to employ private property while negating its inequalities, Marxists appeal to a more radical theory of justice that views private property as inherently unjust.

1. COMMUNISM AS BEYOND JUSTICE

One of the most striking features of Rawls's theory is its claim that 'justice is the first virtue of social institutions' (Rawls 1971: 3). Justice, according to Rawls, is not one amongst a number of other political values, like freedom, community, and efficiency. Rather, justice is the standard by which we weigh the importance of these other values. If a policy is unjust, there is no separate set of values one can appeal to in the hope of overriding justice, for the legitimate weight attached to these other values is established by their location within the best theory of justice. (Conversely, one of the tests of a theory of justice is that it gives due weight to these other values. As Rawls says, if a theory of justice does not give adequate scope to community and freedom, then it will not be attractive to us.)

Liberals emphasize justice because they see a tight connection between it and the basic idea of moral equality. Liberals promote the *moral* equality of

people by formulating a theory of *juridical* equality, which articulates each individual's claims to the conditions which promote their well-being. Many Marxists, on the other hand, do not emphasize justice, and indeed object to the idea that communism is based on a principle of justice. In this regard, they are following Marx himself, who attacked the ideas of 'equal right' and 'fair distribution' as 'obsolete verbal rubbish' (Marx and Engels 1968: 321). This is the conclusion Marx draws from his analysis of the 'contribution principle'—i.e. the claim that labourers have a right to the products of their labour. While many socialists in his day viewed the contribution principle as an important argument for socialism, Marx says that it has many 'defects' which make it, at best, a transitional principle between capitalism and communism. The contribution principle gives people an 'equal right', since everyone is measured by an equal standard (i.e. labour). However, some people have greater natural talents, so this equal right becomes an 'unequal right for unequal labour':

it tacitly recognizes unequal individual endowment and thus productive activity as natural privileges. *It is, therefore, a right of inequality, in its content, like every right.* Right by its very nature can consist only in the application of an equal standard; but unequal individuals (and they would not be different individuals if they were not unequal) are measurable only by an equal standard in so far as they are brought under an equal point of view, are taken from one *definite* side only, for instance, in the present case, are regarded *only as workers* and nothing more is seen in them, everything else being ignored. (Marx and Engels 1968: 320)

According to Allen Wood, this passage shows that Marx was averse, not only to the idea of justice, but to the concept of moral equality underlying it. On Wood's view, Marx was 'no friend to the idea that "equality" is something good in itself', and he was not 'a believer in a society of equals' (Wood 1979: 281; 1981: 195; cf. Miller 1984: ch. 1).

But Marx's argument here does not reject the view that the community should treat its members as equals. What he denies is that the community should do so through implementing a theory of juridical equality. In this passage, Marx endorses a principle of equal regard, but denies that any 'equal right' ever captures it because rights work by defining one limited viewpoint by which individuals are to be regarded equally. For example, the contribution principle views people as workers only, but ignores the fact that different workers vary both in their talents and in their needs—for example, 'one worker is married, another not; one has more children than another, and so on' (Marx and Engels 1968: 320). In reality, the number of viewpoints relevant to determining the true meaning of equal regard is indefinite, or, in any event, cannot be specified in advance. But notice that this description of the effect of 'equal rights' is only a criticism if people are owed equal concern and respect—that is why these inequalities are 'defects'. Marx rejected the idea of

equal rights, not because he was not a friend to the idea of treating people as equals, but precisely because he thought rights failed to live up to that ideal. In fact, the idea of moral equality is basic to Marx's thought (Arneson 1981: 214–16; Reiman 1981: 320–2; 1983: 158; Geras 1989: 231, 258–61; Elster 1983a: 296; 1985: ch. 4).⁵

Marxists have a number of objections to the idea of juridical equality. The first one, as we have seen, is that equal rights have unequal effects, since they only specify a limited number of the morally relevant standpoints. But that argument is weak, for even if it is true that we cannot define in advance all the relevant standpoints, it does not follow that the best way of treating people with equal regard is by not specifying any viewpoints at all. Even if a schedule of rights cannot fully model equal regard, it may do so better than any other alternative. In fact, what else can we do except try to specify the standpoints we think morally relevant? We can only avoid this difficult task by avoiding having to make distributive decisions at all. This is indeed what some Marxists have hoped to do, by assuming that there will be an abundance of resources under communism, but, as we will see, this is an unrealistic hope.

A second objection is that theories of 'just distribution' concentrate too much on *distribution*, rather than on the more fundamental questions of *production* (Young 1981; Wood 1972: 268; Buchanan 1982: 56–7, 122–6; Wolff 1977: 199–208; Holmstrom 1977: 361; cf. Marx and Engels 1968: 321). If all we do is redistribute income from those who own productive assets to those who do not, then we will still have classes, exploitation, and hence the kind of contradictory interests that make justice necessary in the first place. We should instead be concerned with transferring ownership of the means of production themselves. When this is accomplished, questions of fair distribution become obsolete.

This raises an important point. We should be concerned with ownership, for ownership allows people not only to accrue greater income, but also to gain a measure of control over other people's lives. A scheme of redistributive taxation may leave a capitalist and a worker with equal incomes, but it would still leave the capitalist with the power to decide how the worker spends much of her time, a power that the worker lacks in relation to the capitalist. As an objection to the idea of justice, however, this complaint fails. Nothing in the idea of justice limits it to questions of income. On the contrary, as we have seen, both Rawls and Dworkin include productive assets as one of society's resources to be distributed in accordance with a theory of justice. Indeed, Rawls argues that a more egalitarian pattern of property-ownership is required for his ideal of a 'property-owning democracy'. And if Dworkin tends, when discussing the practical implementation of his theory, to look solely at schemes of income redistribution, rather than a fundamental redistribution of wealth, that is incompatible with his own theory of justice

(Ch. 3, s. 5). The Marxist objection to the class structure of capitalist relations of production is, above all, a distributive objection, and so fits comfortably within the normal scope of theories of justice (as Marx himself sometimes noted—Marx and Engels 1968: 321; Marx 1973: 832; cf. Arneson 1981: 222–5; Geras 1989: 228–9; Cohen 1988: 299–300).

At best, these two objections point to limitations in the way that some people have developed their conceptions of justice. The heart of the Marxist critique, however, is an objection to the very idea of a juridical community. Many Marxists believe that justice, far from being the first virtue of social institutions, is something that the truly good community has no need for. Justice is appropriate only if we are in the 'circumstances of justice', circumstances which create the kinds of conflicts that can only be solved by principles of justice. These circumstances are usually said to be of two main kinds: conflicting goals, and limited material resources. If people disagree over goals, and are faced with scarce resources, then they will inevitably make conflicting claims. If, however, we could eliminate either the conflicts between people's goals, or the scarcity of resources, then we would have no need for a theory of juridical equality, and would be better off without it (Buchanan 1982: 57; Lukes 1985: ch. 3).

According to some Marxists, the circumstance of justice which communism seeks to overcome is conflicting conceptions of the good. They take the family as an example of an institution which is non-judicial, where there is an identity of interests, in which people respond spontaneously to the needs of others out of love, rather than responding on the basis of rightful duties or calculations of personal advantage (cf. Buchanan 1982: 13). If the community as a whole also had an identity of interests and affective ties, then justice would not be needed, because to conceive of oneself as a bearer of rights is to 'view oneself as a potential party to interpersonal conflicts in which it is *necessary* to assert claims and to "stand up" for what one claims as one's due' (Buchanan 1982: 76). If we fulfilled each other's needs out of love, or out of a harmony of interests, then there would be no occasion for such a concept of rights to appear.

I have argued elsewhere that Marx did not believe in this vision of an affectively integrated community with an identity of interests. For Marx, communist relations are free of antagonism 'not in the sense of individual antagonism, but of one arising from the social conditions of life of the individuals' (Marx and Engels 1968: 182).⁶ The 'harmony of ends' solution to the circumstances of justice is, in fact, more of a communitarian ideal than a Marxian one (cf. Ch. 6, s. 8c below). Moreover, it is doubtful whether this is a possible solution to the circumstances of justice. For even if we share a set of goals, we may still have conflicting personal interests (e.g. two music-lovers wanting the only available opera ticket). And even where we lack conflicting

personal interests, we may disagree about how to achieve a shared project, or about how much support it deserves. You and I may both believe that experiencing music is a valuable part of a good life, and that music should be supported with one's time and money. But you may wish to support music in such a way as to allow the greatest number of people to experience it, even if that means that they experience lower-quality music, whereas I want to support the highest-quality music, even if that means some people never experience it. So long as there are scarce resources, we will disagree over how much support should go to which musical projects. Shared ends only eliminate conflicts over the use of scarce resources when people share means and priorities as well. But the only people who share identical ends for the identical reasons with identical intensity are identical people. And this raises the question of whether conflicting ends are best seen as a 'problem' which needs to be 'remedied' or overcome. It is perhaps true that conflicts are not, in and of themselves, something to be valued. But the diversity of ends which makes such conflicts inevitable may be something to be valued.

The other solution to the circumstances of justice is to eliminate material scarcity. As Marx puts it:

In a higher phase of communist society, after the enslaving subordination of the individual to the division of labour . . . has vanished; after labour has become not only a means to life but life's prime want; after the productive forces have also increased with the all-round development of the individual, and all the springs of co-operative wealth flow more abundantly—only then can the narrow horizon of bourgeois right be crossed in its entirety and society inscribe on its banners: From each according to his ability, to each according to his needs! (Marx and Engels 1968: 320–1)

Marx was emphatic about the need for abundance, for he thought that scarcity made conflicts unresolvable. The highest development of the productive forces 'is an absolutely necessary practical premise [of communism] because without it *want* is merely made general, and with *destitution* the struggle for necessities and all the old filthy business would necessarily be reproduced' (Marx and Engels 1970: 56). It was perhaps because he was so pessimistic about the social effects of scarcity that he became so optimistic about the possibility of abundance (Cohen 1990b).

However, this solution to the circumstances of justice is also implausible (Lukes 1985: 63–6; Buchanan 1982: 165–9; Nove 1983: 15–20). Certain resources (e.g. space) are inherently limited, and the recent wave of environmental crises has revealed the empirical limits to other resources we depend on (e.g. clean drinking water; oil reserves). Moreover, certain kinds of conflicts and harms can arise even with an abundance of certain resources. One example that arises *because* of an ability and desire to help others is the potential conflicts involved in paternalism. So even if justice is appropriate only as a

response to problems in society, it may not be possible to overcome these problems.

But is justice best viewed as a remedial virtue that should be superseded? Marxists argue that while justice helps mediate conflicts, it also tends to create conflicts, or, at any rate, to decrease the natural expression of sociability. Hence justice is a regrettable necessity at present, but a barrier to a higher form of community under conditions of abundance. It is better if people act spontaneously out of love for each other, rather than viewing themselves and others as bearers of just entitlements.

But why are these two opposed, why must we choose either love or justice? After all, some people argue that a sense of justice is a precondition of, and indeed partly constitutive of, love for others. The concern seems to be that if we give people rights they will automatically claim them, regardless of the effects on others, including the ones they love. For example, Buchanan says that justice involves 'casting the parties to conflict in the narrow and unyielding roles of rights-bearers' (Buchanan 1982: 178). Similar complaints about 'rights-talk' have been raised by communitarians, who argue that the language of rights and justice encourages an antagonistic, zero-sum conception of social life, and displaces more noble sentiments of love or affection.⁷

But why can't I choose to waive my rights whenever their exercise would harm the people I love? Consider the family. Does the fact that women in France now have the right to move to another town and work there without their spouse's permission mean that they will exercise that right rather than keep their families together? (Similarly, have men, who have always had that right, never forgone a career move for the sake of their families?) Buchanan says that 'for those who find the bonds of mutual respect among right-bearers too rigid and cold to capture some of what is best in human relationships, Marx's vision of genuine community—*rather than* a mere juridical association—will remain attractive' (Buchanan 1982: 178, my emphasis). But if the family is an example of what is best in human relationships, then the contrast is spurious. The family has always been a juridical association, in which spouses and children are all rights-bearers (though not equally so). Does that mean that marriage is after all not a sphere of mutual affection, but, as Kant put it, an agreement between two people for 'reciprocal use of each other's sexual organs'? Of course not. Families can have loving relationships, and the juridical nature of marriage does nothing to prevent them. Surely no one believes that people will only act out of love if they are denied the opportunity to do otherwise.⁸

Rawls's claim about the priority of justice is not a claim 'about whether a person will, or should, push to the limit their rightful claims to various advantages' (Baker 1985: 918). While the priority of justice ensures that individuals are able to claim certain advantages, it equally ensures that they are able to

share these advantages with those they love. Generous and loving people will be generous and loving with their just entitlements—far from inhibiting this, the priority of justice makes it possible. What justice excludes is not love or affection, but injustice—the subordination of some people's good to others', through the denial of their just entitlements (Baker 1985: 920). And this, of course, is the opposite of genuine love and affection.

Justice is not only compatible with a concern for others, it is itself an important form of concern for others. It is often said that a concern for rights involves a self-understanding that is grounded in egoism and a concern to protect oneself against the likely antagonism of others in a zero-sum social world. Buchanan, for example, says that to think of oneself as a rights-bearer is to 'view oneself as a potential party to interpersonal conflicts in which it is *necessary* to assert claims' (Buchanan 1982: 76). To claim a right, on this view, is to have a certain pessimistic view of how others will *respond* to our requests. But Buchanan himself suggests another reason for valuing the recognition of rights. He says that for someone to think of himself as a rights-bearer is to 'think of himself as being able to demand what he has a right to as his due, rather than as something he may merely request as being desirable' (Buchanan 1982: 75–6). These are two very different self-understandings, although they are often conflated. The second self-understanding concerns not the probability of getting something I want or need, but the grounds on which I think of myself as properly (e.g. not selfishly) having it. I may want to avoid taking advantage of the (potentially self-sacrificing) love of others. If so, then justice can serve as a standard for determining what I am non-selfishly entitled to, even when others are prepared to give me more than I am entitled to.

Justice can also serve as a standard for determining how to respond to the needs of others, even where the reason I want to help is simply my love for them. I may desire to help several people, all of whom are in need, because I love them, not because I owe them my help. But what if their needs conflict? As Rawls points out, it is no good to say I should act benevolently rather than justly, for "benevolence is at sea as long as its many loves are in opposition in the persons of its many objects" (Rawls 1971: 190). While love is my motivation, justice may be the standard I appeal to, given that love yields conflicting imperatives. Hence, 'while friendship may render justice unnecessary as a *motive*, it may still require some aspects of justice as a *standard*. Friends do not automatically know what to do for one another' (Galston 1980: 289 n. 11). Justice, therefore, serves two important purposes. When making claims, I may wish to know what I am properly entitled to, even when others will fulfil my requests without concern for my entitlements. When responding to the claims of others, I may wish to know what their entitlements are, even when love is the motivation for my response. In neither case is my interest in the teachings of justice a matter of 'standing up for my due'.

The public recognition of rights can be valuable in another way. A person may be sure of getting what she wants, by virtue of her participation in a highly respected social practice (e.g. as a teacher). She has no need for rights, on Buchanan's first account of them, because others value her contribution to that practice, and reward her generously for it. Yet she may want to know that people would accord her rights even if they did not share her commitments. And she may want to know this even if she has no desire to leave that practice, for this recognizes that she is a source of value in and of herself, not just qua occupant of a social role.

Justice is more than a remedial virtue. Justice does remedy defects in social coordination, and these defects are ineradicable, but it also expresses the respect individuals are owed as ends in themselves, not as means to someone's good, or even to the common good. Justice recognizes the equal standing of the members of the community, through an account of the rights and entitlements we can justly claim. But it does not force people to exercise these entitlements at the expense of the people or projects they care about. Justice constitutes a form of concern that we should have for the members of our community, and enables us to pursue all the other forms of love and affection which are consistent with that underlying moral equality. The view that we could create a community of equals by abandoning these notions of fairness, rights, and duties is untenable.⁹

Marx's dismissive approach to justice is part of a broader pattern. He believed that communism would eliminate the need for most of the basic concepts and categories of liberal thought, including rights, toleration, representative democracy, opposition political parties, the rule of law, and markets. All of these, Marx believed, were 'merely remedial, palliatives for dealing with material, social, cultural and epistemological problems that can be overcome, thereby rendering the remedies unnecessary' (Lukes 1995: 3). Marx envisaged a future society without scarcity, conflicting economic interests, ethnic or religious divisions, or imperfect rationality. Such a society would not need the sorts of practices and institutions which liberal states have developed to remedy these problems. Moreover, as I noted at the beginning of the chapter, Marx thought that engaging in moral debates about these practices and institutions was simply a distraction from the real business of the inevitable proletarian revolution. As a result, until quite recently, few Marxists have shown an interest in developing a normative theory of justice, rights, toleration, or democracy.

Today, however, virtually all analytic Marxists accept that scarcity, conflict, pluralism, and imperfect rationality are permanent features of the human condition, and that any plausible normative political theory must explain how political institutions will deal with these facts. And the first step in this direction is to develop a Marxist theory of justice.¹⁰

2. COMMUNIST JUSTICE

If justice is both ineradicable and desirable, what would Marxist justice look like? It is standardly supposed that Marxism is egalitarian, indeed more egalitarian than liberalism, further to the left. This is certainly true in regard to mainstream liberalism and its ideology of equal opportunity, according to which unlimited inequalities are legitimate so long as there is fair competition for higher-paying positions (Ch. 3, s. 2 above). But it is not immediately obvious what room there is to the left of Rawls's version of liberal egalitarian justice, since it too rejects the prevailing ideology, and accepts inequalities only if they work to the benefit of the least well off. What distinguishes Marxist from Rawlsian justice is not the extent to which resources should be equalized, but rather the form in which such equalization should occur. Rawls believes that equality of resources should take the form of equalizing the amount of private property available to each person. For Marx, on the other hand, 'the theory of the Communists may be summed up in a single phrase: Abolition of private property.' Private ownership is permissible in areas of 'personal property', like the clothes, furnishings, and leisure goods we use at home and at play. But it is 'fundamental' to Marxism that 'there is no moral right to the private ownership of and control of productive resources' (Geras 1989: 255; cf. Cohen 1988: 298). Equalization of productive resources should take the form of socializing the means of production, so that each person has equal participation in collective decisions about the deployment of productive assets, made at the level of either individual firms or national economic planning.

Why should equality take the form of equal access to public resources, rather than an equal distribution of private resources? One reason is simply that Rawls's idea of a 'property-owning democracy' may not be empirically viable. It may be impossible to equalize productive resources in modern economies except through socializing ownership. As Engels put it, 'the bourgeoisie . . . could not transform these puny means of production into mighty productive forces without transforming them, at the same time, from means of production of the individual into *social* means of production workable only by a collectivity of men'. Under capitalism, however, these 'socialized means of production' are still treated 'just as they had been before, i.e. as the means of production of individuals'. The solution to this contradiction 'can only come about by society openly and directly taking possession of the productive forces which have outgrown all control except that of society as a whole' (Marx and Engels 1968: 413, 414, 423).

For Engels, the need to socialize ownership is not based on any distinctive theory of justice, but simply on an inability to conceive of any other device for

equalizing resources in a modern industrial economy. Some Marxists also object on empirical grounds to Rawls's assumption that the inequalities arising from market transactions in a well-ordered society would tend to benefit the less well off. If they would not, and if redistributive mechanisms are inherently vulnerable to political pressure, then we might adopt socialism on the basis of a 'greater-likelihood principle' (Schweickart 1978: 11, 23; DiQuattro 1983: 68–9; Clark and Gintis 1978: 322).

For these and other reasons, some critics conclude that Rawls's idea of a property-owning democracy is 'at best fanciful' (Nielsen 1978: 228), and that the whole idea of a property-owning democracy only makes sense in its original Jeffersonian context of an agrarian society composed of independent landholders (Macpherson 1973: 135–6; Weale 1982: 57). If so, then socializing the means of production may be the only viable way of implementing the difference principle. On the other hand, as I noted in Chapter 3, liberal egalitarians have advanced various proposals for increasing *ex ante* equality in endowments—such as the stakeholder society, compensatory education, basic income, coupon capitalism, and the pragmatic egalitarian planner—which have simply never been tried. It may be premature to declare that greater equality in productive assets is unfeasible.

While these objections to the viability of an egalitarian private property regime account for much of the left-wing criticism of Rawls's theory—and for much of the day-to-day debate between liberal egalitarians and socialists—there are also more theoretical objections to the very idea of private property. According to many Marxists, private ownership of the means of production should be abolished because it gives rise to the wage-labour relationship, which is inherently unjust. Some Marxists claim that wage-labour is inherently exploitative, others claim that it is inherently alienating. On either view, justice is only secured by abolishing private property, even if a Rawlsian property-owning democracy is empirically viable.

(a) Exploitation

The paradigm of injustice for Marxists is exploitation, and, in our society, the exploitation of the worker by the capitalist. The fundamental flaw of liberal justice, Marxists claim, is that it licenses the continuation of this exploitation, since it licenses the buying and selling of labour. Does liberal justice allow some to exploit others? It depends, of course, on how we define exploitation. In its everyday usage, exploitation (when applied to persons rather than natural resources) means 'taking unfair advantage of someone'. Every theory of justice, therefore, has its own theory of exploitation, since every theory has an account of the ways it is permissible and impermissible to benefit from others. On Rawls's theory, for example, a talented person takes unfair advantage of the untalented if he uses their weak bargaining position to command an

unequal share of resources not justified by the difference principle. It is not exploitative, however, for someone to benefit from employing others if this works to the maximal benefit of the least well off. If we are convinced of the fairness of Rawls's theory, then we will deny that it licenses exploitation, since part of what it means to accept a theory of justice just is to accept its standard for judging when others are unfairly taken advantage of.

Marxists, however, operate with a more technical definition of exploitation. In this technical usage, exploitation refers to the specific phenomenon of the capitalist extracting more value from the worker's labour (in the form of produced goods) than is paid back to the worker in return for that labour (in the form of wages). According to classical Marxist theory, capitalists only hire workers when they can extract this 'surplus value', and so this exploitative transfer of surplus value from the worker to the capitalist is found in all wage relationships. This technical definition of exploitation is sometimes said to be of scientific rather than moral interest. For example, the fact that capitalists extract surplus value is said to explain how profits are possible in a competitive economy, and this claim does not by itself entail that it is wrong to extract surplus value. Most Marxists, however, have taken the extraction of surplus value as evidence of an injustice—indeed, as the paradigm of injustice.

Does Marxist exploitation have moral significance, i.e. does it involve taking unfair advantage of someone? The traditional argument that technical exploitation is unjust goes like this (from Cohen 1988: 214):

1. Labour and labour alone creates value.
2. The capitalist receives some of the value of the product.

Therefore:

3. The labourer receives less value than he creates.
4. The capitalist receives some of the value the labourer creates.

Therefore:

5. The labourer is exploited by the capitalist.

There are a number of gaps in this argument. Premiss (1) is controversial, to say the least. Many Marxists have tried to defend it by appeal to 'the labour theory of value', according to which the value of a produced object is determined by the amount of labour required to produce it. But as Cohen points out, the labour theory of value actually contradicts (1), for the labour theory says that the value of an object is determined by the amount of labour *currently* required to produce it, not how much labour was actually involved in producing it. If technology changes in such a way that an object can now be produced with half the labour previously required, the labour theory of value says that the value of the object is cut in half, even though the amount of

labour embodied in the already produced object is unaffected. The actual labour expended by the worker is irrelevant, if the labour theory of value is true.

What matters, morally speaking, is not that the workers create value, but that 'they create *what has value* . . . What raises a charge of exploitation is not that the capitalist appropriates some of the value the worker produces, but that he appropriates some of the value *of what* the worker produces' (Cohen 1988: 226–7). Creating products that have value is different from creating the value of those products, and it is the former that really matters for the charge of exploitation. Even if someone other than the worker creates the value of the product—if, for example, its value is determined by the desires of its consumers—then Marxists would still say that the worker is exploited by the capitalist, for it is the worker, not the capitalist or the consumers, who created the product. Hence the proper argument is this (Cohen 1988: 228):

1. The labourer is the only person who creates the product, that which has value.
2. The capitalist receives some of the value of the product.

Therefore:

3. The labourer receives less value than the value of what he creates.
4. The capitalist receives some of the value of what the labourer creates.

Therefore:

5. The labourer is exploited by the capitalist.

This modified version of the Marxist argument yields the conclusion that wage relationships are inherently exploitative. But it is not clear that the exploitation involved here is an injustice. In the first place, there is nothing unjust about volunteering to contribute one's labour to others. Most Marxists, therefore, add the proviso that the worker must be forced to work for the capitalist. Since workers do not in general own any productive assets, and can only earn a living by working for a propertied capitalist (though not necessarily for any particular capitalist), most wage relationships fall under this proviso (Reiman 1987: 3; Holmstrom 1977: 358).

Is the forced transfer of surplus value exploitative in the everyday sense? This is both too weak and too strong. It is too weak in excluding from the purview of exploitation wage-labour which is not, strictly speaking, forced. If, for example, a safety net is in place, guaranteeing a minimal income to all, then the propertyless can acquire a subsistence living through the welfare state, without having to work for a capitalist. But we might still want to say that workers are exploited. While the propertyless are not forced to work for a capitalist in order to survive, that may be the only way for them to earn a

decent standard of living, and we might think it is unfair that they should have to yield surplus labour to capitalists in order to secure a comfortable living. One can say that such people are 'forced' to work for the capitalist, since the alternatives are in some way unacceptable or unreasonable. But, as we will see, the important question is not whether workers are forced to work for capitalists, but whether the unequal access to resources which 'forces' workers to accept that surplus transfer is unfair.

Defining exploitation as forced transfer of surplus labour is also too strong, for there are many legitimate instances of forced transfer of surplus value. What if workers are like apprentices who must work for others for a period of five years, but then are able to become capitalists themselves (or masters)? According to Jeffrey Reiman, this is exploitative: 'we care about workers being forced to sell their labour power, because we understand this as forcing them to work without pay. And we care about how long workers are forced to work without pay, because of how we feel about people being forced to work without pay for any period of time' (Reiman 1987: 36). But this is implausible. If all workers can become capitalists, and if all capitalists begin as workers, then there is no inequality over the course of people's lifetimes. Like apprentices, there is simply a period where workers have to pay their dues (Cohen 1988: 261 n. 9). To insist that it is exploitative to forcibly transfer surplus value, regardless of how this fits into a larger pattern of distributive justice, guts the charge of exploitation of all its moral force. It manifests a kind of fetishism about owning one's labour. Indeed, it manifests a libertarian concern with self-ownership:

Marxists say that capitalists steal labour time from working people. But you can only steal from someone that which properly belongs to him. The Marxist critique of capitalist injustice therefore implies that the worker is the proper owner of his labour time: he, no one else, has the right to decide what will be done with it . . . Hence the Marxist contention that the capitalist exploits the worker depends on the proposition that people are the rightful owners of their own powers. [Indeed], if, as Marxists do, you take appropriation of labour time as such, that is, in its fully general form, as a paradigm of injustice, then you *cannot* eschew affirmation of something like the self-ownership principle. (Cohen 1990a: 366, 369)

That this is a libertarian assumption is shown by the fact that compulsory taxation to support children or the infirm also counts as exploitation, according to Reiman's definition. If we force workers to pay taxes to support the infirm, then we are forcing them to work without pay.¹¹

In his initial presentation of the Marxist exploitation argument, Cohen denied that it presupposes that people own the products of their labour: 'One can hold that the capitalist exploits the worker by appropriating part of the value of what the worker produces without holding that all of that value

should go to the worker. One can affirm a principle of distribution according to need, and add that the capitalist exploits the worker because his need is not the basis on which he receives part of the value of what the worker produces' (Cohen 1988: 230 n. 37). But what then is the justification for saying that the capitalist is exploiting the *worker*? Assuming that the capitalist does not need the object, and hence has no legitimate claim to it, it does not follow that the worker has any claim under the needs principle. The person most in need may be some third party (e.g. a child), and then the child has the only legitimate claim to the object. If the capitalist nonetheless appropriates the object, then he is unjustly treating the child, not the worker. Indeed, if the worker appropriates the object, then she too is unjustly treating the child. When the needs principle is violated, the people who are unjustly treated are the needy, not the producers.

Moreover, what if the capitalist does need the surplus value? Let's say that the capitalist is infirm, and has had the good fortune to have inherited a large number of shares in a company. Cohen implies that this is still exploitation, for 'his need is not the basis on which he receives part of the value of what the worker produces'. Rather, it is his ownership of the means of production. But the worker's need is not the basis on which she receives the product either. Rather, it is her production of the object. So who then is the capitalist exploiting? No one, for under the needs principle, no one else had any legitimate claim to the resources. Moreover, why can't need be the basis on which a capitalist receives surplus value? What if the government, in order to avoid leaving support for the infirm subject to the vagaries of day-to-day politics, endows the infirm with capital from which they can derive a steady stream of financial support? Distributing capital to the infirm might, in fact, be a very good way of meeting the needs principle (cf. Cohen 1990a: 369–71; Arneson 1981: 206–8). Once we drop the self-ownership claim, then the appropriation of surplus labour is not, as such, inherently exploitative—it all depends on how the particular transaction fits into a larger pattern of distributive justice.

There is another problem with the exploitation argument. What about those who are forced *not* to sell their labour? Married women have been legally precluded from taking wage employment in many countries. Hence they are not exploited. On the contrary, they are being protected from exploitation, which is indeed how many people defend sexual discrimination. But if married women in these countries are given a small income from government taxes, then they become exploiters, on the Marxian exploitation argument, since part of each worker's income is forcibly taken away and put at their disposal. But it would be perverse to view women under these circumstances as beneficiaries of exploitation. They suffer from an injustice worse than exploitation by capitalists, and one of the first tasks of feminist movements has been to gain equal access for women to wage-labour markets.¹² Or

consider the unemployed, who are legally able to accept wage employment, but can find none. They too are not exploited, under the Marxist definition, since they do not produce any surplus value for the capitalist to appropriate. And if the government taxes workers to pay them a benefit, then they too become exploiters. Yet they are worse off than those who are able to find a wage relationship (Roemer 1982*b*: 297; 1988: 134–5).

These examples suggest that there is a deeper injustice underlying exploitation—namely, unequal access to the means of production. Disenfranchised women, the unemployed, and wage-workers in our society all suffer from this injustice, while capitalists benefit from it. The exploitation of workers by capitalists is just one form this distributive inequality can take. The subordinate position of women and the unemployed are other forms, and judging by people's struggles to gain wage employment, these may be more damaging forms. For those who lack access to property, being forced to sell one's labour may be better than being forced not to (women), or being unable to (unemployed), or eking out a marginal existence from crime, begging, or living off whatever land remains common property (Marx's 'lumpenproletariat').

Something has gone wrong here. Exploitation theory was supposed to provide a radical critique of capitalism. Yet, in its standard form, it neglects many of those who are worst off under capitalism, and actually precludes the action needed to help them (e.g. welfare support for children, the unemployed, and the infirm). If exploitation theory is to take due account of these groups, it must abandon the narrow focus on surplus transfer, and instead examine the broader pattern of distribution in which these transfers occur. This is the main aim of John Roemer's work on exploitation. He defines exploitation, not in terms of surplus transfer, but in terms of unequal access to the means of production. Whether one is exploited or not, on his view, depends on whether one would be better off in a hypothetical situation of distributive equality—namely, where one withdrew with one's labour and per capita share of external resources. If we view the different groups in the economy as players in a game whose rules are defined by existing property relations, then a group is exploited if its members would do better if they stopped playing the game, and withdrew with their per capita share of external resources and started playing their own game. According to Roemer, both employed and unemployed workers would be better off by withdrawing from the capitalist game, and so are exploited.

Exploitation in the technical sense—the transfer of surplus value—plays only a limited role in Roemer's theory. It is one of the most common results of distributive injustice under capitalism, but it has no ethical interest apart from that inequality. It is 'a bad thing only when it is the consequence of an unjust unequal distribution in the means of production' (Roemer 1988: 130). Surplus

transfer is legitimate when it is untainted by distributive inequality, or when it helps compensate for that inequality. For example, state-mandated support for the unemployed and for disenfranchised women reduces, rather than creates, exploitation, for it helps rectify 'the loss suffered by [them] as a result of the unequal initial distribution of property' (Roemer 1988: 134). For Roemer, the 'ethical imperative' of exploitation theory, therefore, is not to eliminate surplus transfers, but to 'abolish differential ownership of the alienable means of production' (Roemer 1982*b*: 305; 1982*c*: 280).

Cohen says that Roemer's theory makes Marxists 'more consistent egalitarians' (Cohen 1990*a*: 382). But Roemer's account of exploitation still views compulsory support of the infirm (or children) as exploitation, for it gives them more than they would be able to secure for themselves with their per capita share of resources.¹³ Inequalities due to unequal natural talents are not a matter of exploitation, and so Roemer's 'ethical imperative' is still less egalitarian than those theories which attempt to compensate for natural disadvantages. By defining exploitation in terms of the results of an unequal distribution of external resources, Roemer works 'without recourse to the radical egalitarian premise of denying self-ownership' (Roemer 1988: 168).

Roemer expresses sympathy with theories which take this radical step, like those of Rawls and Dworkin. And he himself says that the shift from socialism to communism should involve eliminating differential entitlement to resources due to differences in natural talents. He says that inequalities due to differences in natural talents can be seen as a form of 'socialist exploitation'—i.e. a form of exploitation that continues to exist under socialism, but which would be abolished under communism. But while he personally endorses the legitimacy of restricting self-ownership to remedy inequalities due to natural talents, he says that this is a separate issue from the traditional Marxist conception of the way workers are exploited under capitalism, which presupposes that people are entitled to the fruits of their labour (Roemer 1982*c*: 282–3; 1982*b*: 301–2). Marxist exploitation theory works with the 'more conservative' premiss that people have rights of self-ownership, so that equality of resources does not include any requirement that unequal talents be compensated for (Roemer 1988: 160; cf. 1982*a*: chs. 7–8).

Arneson gives a similar account of exploitation. Like Roemer, he says that judgements of 'wrongful exploitation' require a comparison with a hypothetical egalitarian distribution, although his account of equal distribution precludes differences that arise from unequal natural talents as well as unequal external resources. Arneson believes that most workers under capitalism are exploited according to this test, for they suffer from undeserved inequalities in either wealth or talent which enable others to take advantage of them (Arneson 1981: 208). As with Roemer, surplus transfer plays a derivative role in Arneson's theory. Surplus transfer is wrong if it is the result of an unequal

distribution, but is legitimate if it arises independently of, or if it is used to compensate for, undeserved differences in wealth or natural talents. Hence compulsory support for the unemployed is legitimate, as is support for the infirm. Most of the surplus taken from workers under capitalism, however, is not of the legitimate kind, since it winds up in the hands of those who benefit from the unequal distribution of talents and wealth. Hence capitalism is exploitative, albeit for more complex reasons than suggested by the initial Marxian exploitation argument.

This is a more plausible account of exploitation. By focusing on the broader pattern of distribution, not just the exchange that occurs within the wage relationship, Roemer and Arneson avoid both of the problems that plagued Reiman's account. Their accounts allow us to say that workers in a welfare state can be exploited, whether or not they are 'forced' to work for capitalists, since they are denied fair access to the means of production. Their accounts also allow us to deal with cases of distributive injustice that occur outside the wage relationship, like the injustice of being unable or unfree to find employment, since these too involve a denial of fair access to resources.¹⁴

Unfortunately, this is a more attractive approach precisely because it has left behind all that was distinctive about the original Marxist approach to exploitation. This new approach differs in three important ways from that original approach. First, the idea of exploitation is now derived from a prior and broader principle of distributive inequality. In order to know what counts as exploitation, we need first to know what people are entitled to by way of rights over themselves and external resources. And once we make these underlying principles explicit, it is clear that exploitation is simply one of many forms of distributive injustice, not the paradigm of injustice. Unfortunately, Marxists remain prone to exaggerating the moral centrality of exploitation. Roemer, for example, expands the ambit of exploitation to cover all forms of distributive inequality.¹⁵ As we have seen, this enables him to consider the fate of the unemployed as well as the wage-worker. But it is confusing to call both of these cases of exploitation. Our everyday sense tells us that exploitation requires some direct interaction between exploiter and exploited in which the former takes unfair advantage of the latter, and this is not generally true of the unemployed. They are unfairly neglected or excluded, but not necessarily unfairly taken advantage of, for capitalists may gain no benefit from their plight. To say that all forms of injustice are forms of exploitation is not to gain an insight but to lose a word.¹⁶

Moreover, Roemer's attempted assimilation obscures the relationship between equality and exploitation. He says that different forms of inequality (unfair advantage, exclusion, neglect) are all cases of the broader category of exploitation. But the opposite is more accurate—exploitation is one of the many forms of inequality, all of which are assessed by a deeper and broader

principle of equality. On Roemer's theory, this deeper principle of equality is expressed in the 'ethical imperative' to equalize access to resources. Exploitation is no longer at the moral heart of the theory.

Secondly, the broader theory of justice in which exploitation is situated has become progressively closer to a Rawlsian theory of justice. The original Marxist argument said that workers are entitled to the product of their labour, and it is the forced denial of that entitlement which renders capitalism unjust. But most contemporary Marxists have tried to avoid that libertarian premiss, since (among other reasons) it makes aid to the dependent morally suspect. And the more they try to accommodate our everyday sense that not all technical exploitation is unjust, the more they have appealed to Rawlsian principles of equality. While the Marxist rhetoric of exploitation is taken to be more radical than liberal egalitarian views of justice, 'the Marxist condemnation of the injustice of capitalism is not so different from the conclusion that other apparently less radical contemporary theories of political philosophy reach, albeit in language less flamboyant than Marxism's' (Roemer 1988: 5). Arneson's theory of Marxist exploitation, for example, appeals to the same principle of an ambition-sensitive, endowment-insensitive distribution that underlies Dworkin's theory. In its new forms, Marxist exploitation theory seems to apply liberal-egalitarian principles, rather than compete with them.

Finally, this new account of exploitation abandons what was the *raison d'être* of the original Marxist exploitation argument—namely, the claim that there is an inherent injustice in wage-labour. For if the test of wrongful exploitation is whether there are undeserved inequalities, then some wage relationships are not exploitative. There are two 'clean routes' to wage-labour. First, as we have seen, endowing the infirm with ownership of capital can compensate for unequal natural talents, and so bring us closer to an endowment-insensitive distribution. Secondly, differential ownership of the means of production can arise amongst people with equal endowments, if they have different preferences concerning investment or risk. In the gardener/tennis-player example I used in Chapter 3, the tennis-player wanted to use his resources immediately in consumption, in the form of a tennis court, whereas the gardener invested her resources in production, in the form of a vegetable garden (Ch. 3, s. 4). This was legitimate, I argued, even though the tennis-player ended up working for the gardener (or some other owner of productive assets), because it met the 'envy test'. Each party was free to make the same choices as the other, but neither party desired the other's lifestyle, since they had different preferences about work and leisure. Similarly, the gardener might have acquired more assets by taking a large risk, while the tennis-player, who could have taken the same risk, preferred to have a smaller but risk-free income. Different choices about leisure and risk can lead, in a legitimate and envy-free way, to unequal ownership of productive assets.

Where people's preferences do not differ in these ways, or where any such differences are less important to people than a shared desire to have a democratic say in one's workplace, then we are likely to maintain a system of equal ownership of productive assets. But to enforce a blanket prohibition on wage-labour would be an arbitrary violation of the ambition-sensitivity requirement of a just distribution.¹⁷

None of this justifies existing inequalities in ownership of the means of production. Marx scorned those who argued that capitalists acquired their property through conscientious savings, and he went on to show that 'conquest, enslavement, robbery, murder, briefly force, play the great part' in capital accumulation (Marx 1977c: 873–6, 926; cf. Roemer 1988: 58–9). This unjust initial acquisition undermines the risk argument, for even if capitalists are willing to take risks with their capital, it is not (morally speaking) their capital to take risks with. Workers might be willing to take the same risks as capitalists if they had any capital to take risks with. In any event, 'it cannot seriously be maintained that a worker's life involves less risk than a capitalist's. Workers face the risk of occupational disease, unemployment, and impoverished retirement, which capitalists and managers do not face' (Roemer 1988: 66). So neither effort nor risk aversion can justify existing inequalities (Roemer 1982b: 308; contra Nozick 1974: 254–5). But the fact that capitalism historically arose out of undeserved inequalities does not show that wage-labour could not arise legitimately within a regime such as Rawls's 'property-owning democracy'. Indeed, if people are well informed about the consequences of their choices, and if their different preferences were formed under conditions of justice, then 'the argument appears almost irrefutable' (Elster 1983a: 294).¹⁸

So private property need not be exploitative. Conversely, socialization of the means of production may be exploitative. Marxists are fond of saying that exploitation is impossible within socialism, since producers control their product (e.g. Holmstrom 1977: 353). But on the new approach to exploitation, it is not enough that people have equal access to social resources, in the form of a vote in a democratically run, worker-owned firm. It all depends on what people democratically decide to do with their resources. Consider a firm that is permanently divided into two groups—a majority which, like the gardener, prefers income to leisure, and a minority which, like the tennis-player, prefers leisure to income. If the majority wins all the decisions, and if the minority are not allowed to convert their socialist right of equal access to social resources into a liberal entitlement of equal individual resources (e.g. by selling their share of the firm), they will be unfairly taken advantage of. They will be exploited, on the Roemer–Arneson approach, since they would be better off by withdrawing with their per capita share of resources (Arneson 1981: 226; Geras 1989: 257).

Concern for exploitation, therefore, does not justify a general preference in

favour of socializing, rather than equalizing, the means of production. Equalizing resources may be non-exploitative, even if some people work for others, and socializing resources may be exploitative, even if everyone works for each other. It depends on the preferences people have, and the circumstances they find themselves in. What matters is that people have the sort of access to resources that enables them to make whatever decisions concerning work, leisure, and risk best suit their goals in life. That kind of self-determination may be best achieved through a mix of private property, public ownership, and worker democracy, since each form of ownership creates certain options while blocking others (Lindblom 1977: ch. 24; Goodin 1982: 91–2; Weale 1982: 61–2). These are largely empirical questions, and they cannot be pre-empted by blanket charges of exploitation.

(b) Needs

So far, I have not said much about Marx's claim that distribution under communism will be based on the principle 'to each according to his needs'. I did say that this principle is incompatible with the traditional Marxist conception of exploitation, which excludes the compulsory transfer of surplus labour from workers to others. But what can be said of it on its own, as a principle of justice? As we have seen, it is possible that Marx himself did not think of it as a principle of justice. Given his prediction of abundance, 'to each according to his needs' is not a principle under which scarce resources are distributed, but simply a description of what happens under communism—people take what they need from the stock of abundant resources (Wood 1979: 291–2; Cohen 1990b; but cf. Geras 1989: 263).

Most contemporary Marxists, however, do not share Marx's optimism concerning abundance, and instead invoke the needs principle as a distributive principle. Viewed in this way, it is most plausibly understood as a principle of equal need satisfaction, since Marx offers it as a solution to the 'defects' of the contribution principle, which, as we have seen, are the inequalities created by people's different needs (Elster 1983a: 296; 1985: 231–2). Is this an attractive principle? It is not very attractive if needs are interpreted in terms of bare material necessities. A socialist government that only provided for people's bare material needs would hardly constitute an advance on the welfare state programmes of some Western democracies. Marxists, however, interpret 'needs' in a much more expansive way. Indeed for Marx, human needs are distinguished by their 'limitless and flexible nature', so that people's needs include 'a rich individuality which is as all-sided in its production as in its consumption' (Marx 1977c: 1068; 1973: 325). Hence 'needs' is being used as a synonym for 'interests', which include both material necessities and the various goods that people feel worth having in their lives. So construed, needs encompass such things as important desires and ambitions, and so the needs

principle 'is most plausibly understood as a principle of equal welfare' (Elster 1983a: 296), rather than a principle of equal need satisfaction in any more limited sense.

Unfortunately, once we adopt this expansive interpretation of the needs principle, it no longer gives us much guidance on how to distribute resources. Marxists seem to think that the needs principle is an answer to the question of what it means to give equal consideration to people's interests. But once we expand 'needs' to encompass all our interests, and drop the assumption of abundance, saying that distribution ought to be by need is not an answer to that question, but simply another way of asking it. It tells us nothing about how to attend to the different sorts of interests we have. For example, while needs in the minimal sense are not matters of choice, needs in the Marxist sense fall on both sides of the choices-circumstances line. Whether a given share of resources satisfies one's needs, therefore, depends on how expensive one's needs are, which depends both on one's circumstances and one's choices. Should we provide extra resources for those with expensive needs? And if so, should we spend all our resources on the severely handicapped? Should we distinguish between expensive needs that are chosen and those that are not? These are the questions that Rawls and Dworkin focus on, for without an answer to them, a theory of justice is incomplete. But Marxists have not, in general, explained how the needs principle assigns weight to people's interests.

In so far as Marxists have given some content to the needs principle, the most common area of disagreement with liberal egalitarianism concerns the claim that people are responsible for the costs of their choices, and hence that distributions should be ambition-sensitive. Some Marxists reject the claim outright, on the grounds that people's choices are the product of their material or cultural circumstances, so that people are not responsible for their choices (e.g. Roemer 1985a: 178-9; 1986a: 107, 109; 1988: 62-3). Levine says that this denial that individuals are responsible for their choices 'suggests a far more radical conception of what it is to treat people as equals' than is found in Dworkin's theory (Levine 1989: 51 n. 25). But it is not clear what is particularly radical (or attractive) about denying responsibility. For one thing, there is a tension between the denial of individual responsibility and our commitment to democracy. If people are not responsible for their preferences, why should we respect these preferences as legitimate inputs into the democratic process, and why should we view people as capable of rational argumentation and deliberation? There is a 'pragmatic incoherence' in treating people as responsible agents in our democratic theory, but not as responsible agents in our theory of justice (Elster 1992: 239).

Moreover, requiring some people to subsidize other people's expensive tastes is simply unfair, as many Marxists would agree. As Arneson puts it, 'Consider two persons, both with artistic need, one of whom is cost-conscious

and learns to satisfy this need through media that are cheap (watercolours, pen-and-ink drawings), while the other is not mindful of cost and develops talents that can be exercised only at extravagant cost (huge marble sculptures, deep-sea photography). It is not obvious that 'to each according to his need' is the appropriate principle for distributing scarce resources to these artists' (Arneson 1981: 215). In order to deal with expensive choices, the needs principle requires some guidelines regarding what counts as 'reasonable' needs, so that 'people could be told at the early stages of preference formation that society will not underwrite all sorts of expensive tastes' (Elster 1983a: 298; Geras 1989: 264). According to Arneson, the need for such a social norm reflects 'the vagueness of Marx's slogan' but does not 'call in question its basic moral thrust' (Arneson 1981: 215). But this is in fact a very different understanding of the needs principle, since it tells people to adjust their needs to a pre-existing standard of distribution, whereas the needs principle is usually interpreted as requiring that we adjust distribution to people's pre-existing needs (Elster 1983a: 298).

Whether this ambition-sensitivity requirement is best seen as an abridgement of the needs principle or as an elaboration of it, the net effect is to make Marxist equality more or less identical to Dworkin's theory of equality of resources (Elster 1983a: 298 n. 65).¹⁹ Or, if it is different, Marxists do not tell us how it differs, for they do not tell us how to measure the costs of people's choices. What, for example, plays the role of Dworkin's auction? Marxists have traditionally opposed market mechanisms. But if people are to be held responsible for the costs of their choices, then something like a market is required to measure that opportunity cost. (See Nove 1983: ch. 1 on how the Marxist hostility to markets, combined with the assumption of abundance, has prevented Marxists from coming up with any coherent notion of opportunity costs.)

There is less dispute over the claim that a just distribution be endowment-insensitive. The needs principle 'severs all connections between the amount of benefits one receives from the economy and the "morally arbitrary" genetic and social factors that determine one's ability to contribute to that economy' (Arneson 1981: 215-16). The requirements of the needs principle are clearer here, for it was 'designed precisely to take care of such instances' (Elster 1983a: 298). But even here the needs principle is incomplete, for it does not tell us what to do when it is impossible to compensate fully for natural disadvantages. As we saw in Chapter 3, it is impossible to equalize the circumstances of a severely retarded person, and undesirable to devote all our resources to that task. This led Dworkin to devise his hypothetical insurance scheme. But there is no similar solution to this problem in the contemporary Marxist literature, and indeed no similar recognition that it is a problem. It is not enough to say that the needs principle compensates for unequal circumstances. We need to

know how to do so, and at what price. Until these questions are answered, it is impossible to tell whether or how the needs principle compares with liberal theories of equality.

(c) Alienation

With respect to both the exploitation principle and the needs principle, then, we see a gradual convergence between Marxist and liberal-egalitarian theories of justice. As Roemer puts it, 'the lines drawn between contemporary analytical Marxism and contemporary left-liberal political philosophy are fuzzy. This indicates there is a common core' (Roemer 1986*b*: 200). However, there is a quite different strand of Marxist thinking which is more clearly distinct from that of liberal egalitarianism. According to Steven Lukes, Marx's critique of capitalism appeals not only to a 'Kantian' concern with exploitation, but also to a 'perfectionist' concern with alienation (Lukes 1985: 87; cf. Miller 1989: 52-4).²⁰ Whereas the Kantian strand emphasizes the way private property reduces some people (the workers) to a means for the benefit of others (capitalists), the perfectionist strand emphasizes the way private property inhibits the development of our most important capacities. The problem with private property, on this perfectionist view, is not simply that it is exploitative, for even those who benefit from exploitation are alienated from their essential human powers. This alienation argument seems a more promising route for defending a prohibition on private property, for while equalizing private property eliminates exploitation, it may just universalize the alienation.

Perfectionist arguments, of which Marx's alienation argument is one example, say that resources should be distributed in such a way as to encourage the 'realization of distinctively human potentialities and excellences', and to discourage ways of life which lack these excellences (Lukes 1985: 87). Such theories are 'perfectionist' because they claim that certain ways of life constitute human 'perfection' (or 'excellence'), and that such ways of life should be promoted, while less worthy ways of life should be penalized. This is unlike liberal or libertarian theories, which do not try to encourage any particular way of life, but rather leave individuals free to use their resources in whatever ways they themselves find most valuable. I will consider the general contrast between liberal and perfectionist theories in the next chapter, but I will look briefly at how Marxist perfectionism might defend a prohibition on private property.

Any perfectionist argument must explain what the 'distinctive human excellences' are, and how the distribution of resources should be arranged so as to promote them. In Marx's case, our distinctive excellence is said to be our capacity for freely creative cooperative production. To produce in a way that stunts this capacity is to be 'alienated' from our true 'species-nature'. Hence, Marxist perfectionists argue, resources in a communist society should be

distributed so as to encourage people to achieve self-realization through cooperative production. Distribution might still be governed by the needs principle, but for perfectionists the needs principle is not concerned with all needs. Rather, it would involve 'some selection of those forms of human interest and concerns which most fully express the ideal of co-operative, creative, and productive activities and enjoyments' (Campbell 1983: 138; cf. Elster 1985: 522).

How should this ideal be promoted? Marxists argue it is best promoted by abolishing wage-labour and socializing the means of production. Wage-labour alienates us from our most important capacity, because it turns the worker's labour-power into a mere commodity the disposition of which is under someone else's control. Moreover, for many workers under capitalism, this exercise of labour-power tends to be mindless and devoid of any intrinsic satisfaction. Socializing the means of production ensures that each person has an effective say in how her work life is organized, and enables her to organize production so as to increase its intrinsic satisfaction, rather than to increase the profits of the capitalist. Capitalism reduces our life's activity to a means which we endure in order to secure a decent living, but socialism will restore work to its rightful place as an end in itself, as 'life's prime want' (or, more accurately, socialism will make it possible for the first time in history for labour to assume this rightful place).

This, then, is the perfectionist argument for abolishing private property in the means of production. What are we to make of it? Phrased as a choice between intrinsically satisfying and intrinsically unsatisfying work, most people will favour creative and cooperative work. The evidence is overwhelming that most workers in capitalism wish that their jobs were more satisfying. The 'degradation of labour' which capitalism has imposed on many people is abhorrent, an unconscionable restriction on their ability to develop their human potential (Schwartz 1982: 636-8; Doppelt 1981). Liberals try to deal with this by distinguishing legitimate and illegitimate ways that people can come to be employed by others. But on the Marxist view, any wage relationship is alienating, since the worker gives up control over her labour-power, and over the products of her labour. Wage-labour may not be exploitative, if both parties started with an equal share of resources, but it is alienating, and we can eliminate the alienation by socializing productive resources rather than equalizing private property.

However, while unalienated labour is surely better than alienated labour, these are not the only values involved. I may value unalienated labour, yet value other things even more, such as my leisure. I may prefer playing tennis to unalienated production. I must engage in some productive work to secure the resources necessary for my tennis, and all else being equal, I would prefer it to be unalienated work. But all else is not always equal. The most efficient way

to produce goods may leave little room for creativity or cooperation (e.g. assembly-line production). If so, then engaging in non-alienated work may require a greater investment in time than I am willing to make. For example, if I can acquire the resources I need by doing either two hours a day of alienated work or four hours a day of unalienated work, the extra two hours of tennis may outweigh the two hours of alienation. The question, then, is not whether I prefer unalienated labour to alienated labour, but whether I prefer leisure so much that I would accept alienated labour in order to acquire it. Opportunities for unalienated work 'are not so much manna from the sky. Resources must be used to make these opportunities available, which means lesser availability of some other goods', like leisure (Arneson 1987: 544 n. 38).²¹

Consumption is another good that may conflict with non-alienated production. Some people enjoy consuming a wide variety of goods and services, from food to opera to computers. Agreeing to perform alienated labour in return for higher wages may enable them to expand their range of desired consumption. If we prohibit alienated labour, we eliminate their alienation, but we also make it more difficult for them to pursue forms of consumption they truly value. Marxist perfectionists tend not to be concerned with possible decreases in material consumption. They consider people's concern with consumption as a symptom of the pathology of materialism created by capitalism, so that the transition to socialism 'will involve a large shift in cultural emphasis from consumption to production as the primary sphere of human fulfillment' (Arneson 1987: 525, 528). But is it pathological to be concerned with expanding one's consumption? The 'keeping up with the Joneses' syndrome may be, for the pursuit of such status goods is often irrational. But that is not true of many desires for increased consumption. There is nothing pathological about a music-lover wanting expensive stereo equipment, and being willing to perform alienated labour to acquire it. Hence there is no reason for communism to 'exclude or stigmatize those who prefer the passive pleasures of consumption' over the active pleasures of production (Elster 1985: 522).

The pursuit of unalienated labour can also conflict with relationships to family and friends. I may want a part-time job that allows me as much time as possible with my children, or perhaps seasonal work, so that I can spend part of each year with friends or relatives. As Elster notes, the Marxist emphasis on self-realization in work can compete with spontaneous personal relationships, for there is a 'tendency for self-realization to expand into all available time . . . [and this] is a threat to both consumption and to friendship' (Elster 1986: 101).

The issue is not whether unalienated labour is a good, but whether it is an overriding good, a good which is necessary to any decent life, and which outweighs in value all competing goods. I see no reason to think unalienated labour is such a good. Marx's own argument for this claim is quite

implausible. He argued that freely cooperative production is our distinctive human excellence because this is what differentiates us from other species—it is what defines us *as humans*. But this 'differentia' argument is a non sequitur. Asking what is best in a human life is not a question 'about biological classification. It is a question in moral philosophy. And we do not help ourselves at all in answering it if we decide in advance that the answer ought to be a single, simple characteristic, unshared by other species, such as the differentia is meant to be' (Midgley 1978: 204). Exaltation of cooperative productive activity 'is a particular moral position and must be defended as such against others; it cannot ride into acceptance on the back of a crude method of taxonomy' (Midgley 1978: 204). Whether or not other animals have the same capacity for productive labour as humans has no bearing on the question of the value of that capacity in our lives. There is no reason to think that our most important capacities are those that are most different from other animals.

This focus on productive labour is also sexist. Consider Marx's claim that because workers are alienated from their 'species-life' (i.e. 'labour, life activity, productive life itself'), therefore 'man (the worker) only feels himself freely active in his animal functions—eating, drinking, procreating, or at most in his dwelling and in dressing up, etc.; and in his human functions he no longer feels himself to be anything but an animal' (Marx 1977a: 66). But why is production a more 'human function' than reproduction (e.g. raising children)? It may be less *distinctively* human, in the sense that other animals also reproduce. But this just shows how irrelevant that criterion is, for family life is surely as important to our humanity as production. Marx combined a profound sensitivity to historical variations in the predominantly male sphere of productive life with an almost total insensitivity to historical variations in the predominantly female sphere of reproductive life, which he viewed as essentially natural, not distinctively human (Jaggar 1983: ch. 4; O'Brien 1981: 168–84). Any theory which hopes to incorporate the experience of women will have to question the elevation of productive labour.

There are many values that may compete with unalienated production, such as 'bodily and mental health, the development of cognitive facilities, of certain character traits and emotional responses, play, sex, friendship, love, art, religion' (Brown 1986: 126; cf. Cohen 1988: 137–46). Some people will view productive labour as 'life's prime want', but others will not. A prohibition on alienated labour, therefore, would unfairly privilege some people over others. As Arneson puts it, the identification of socialism with a particular vision of the good life 'elevates one particular category of good, intrinsic job satisfaction, and arbitrarily privileges that good and those people who favor it over other equally desirable goods and equally wise fans of those other goods' (Arneson 1987: 525; cf. Arneson 1993a: 292–6). Given that people differ in the value they attach to labour, 'differential alienation of labor, from an

initial position of equal opportunity and fair division of assets, can vastly increase the welfare and life quality of people'. Hence 'a perfectionist defense of nonalienation seems remote' (Roemer 1985*b*: 52).

Not all Marxists who emphasize the flourishing of unalienated production under communism are perfectionists. Some Marxists who proclaim the end of alienation are simply making a prediction about what people will do with their equal resources, not giving a perfectionist instruction about how to distribute those resources. They predict that people will value unalienated labour so highly that they will never accept improved leisure or family life as compensation for alienation. Should this prediction turn out to be false, however, there would be no reason to interfere with people's choices by prohibiting alienation. It is unclear whether Marx's comments on alienation are predictions or perfectionist instructions (Arneson 1987: 521). Engels, however, was anti-perfectionist, at least in the case of sexual relations. When discussing the nature of sexual relations in communism, he says that the old patriarchal relations will end, but

what will there be new? That will be answered when a new generation has grown up: a generation of men who never in their lives have known what it is to buy a woman's surrender with money or any other social instrument of power, a generation of women who have never known what it is to give themselves to a man from any other considerations than real love or to refuse to give themselves to their lover from fear of the economic consequences. When these people are in the world, they will care precious little what anybody today thinks they ought to do; they will make their own practice and their corresponding public opinion about the practice of each individual—and that will be the end of it. (Engels 1972: 145)

The equal distribution of resources ensures that exploitative relations will not arise, but there is no correct socialist model of personal relations which is to be encouraged or imposed. But why shouldn't economic relations likewise be left to the free choices of people from a position of material equality? We should wait and see what that 'new generation' will choose to do with their lives and talents, and while they may systematically favour unalienated labour, there is no reason for perfectionist intervention to encourage that result.

Again, none of this will justify the existing distribution of meaningful work. I have argued that people should be free to sacrifice the quality of work life for other values, like better leisure. Under capitalism, however, those with the best jobs typically also have the best consumption and leisure, while those with poor jobs often get no compensating increase in leisure or consumption. But the solution is not to give everyone the best possible work, at the expense of improved leisure, since some people would rather have better leisure. As Arneson puts it, 'The core socialist objection to a capitalist market is that people who have fewer resources than others through no fault of their own do not have a fair chance to satisfy their preferences. The solution to this problem

is not to privilege anybody's preferences [e.g. those for work over leisure], but to tinker with the distribution of resources that individuals bring to market trading.' Hence Dworkin's aim of an envy-free market distribution 'is one aspect of socialist aspiration, not a rival doctrine' (Arneson 1987: 537, 533).

This returns us to the 'Kantian' strand of Marxist thought, which leaves individuals free to decide for themselves what is worth doing with their fair share of resources. And, as we have seen, this leads to a series of questions about fair distribution which Marxists have not addressed. Until they do, it is difficult to tell whether Marxism provides a distinctive account of justice from those of other political traditions.

3. SOCIAL DEMOCRACY AND SOCIAL JUSTICE

So far in this chapter, I have examined whether contemporary analytic Marxism provides an alternative approach to liberal egalitarianism. But there are other non-Marxist conceptions of socialism. In Marx's own day, these were often associated with various Christian sects, whose promotion of equality and collective ownership was tied up with specifically Christian views of fellowship, piety, and material renunciation. Marx tended to dismiss such groups as 'utopian socialists'.

In the twentieth century, however, the strongest proponents of socialist ideals in the West have been neither Marxist nor Christian, but rather secular social-democratic parties, often closely affiliated with labour movements. And it is sometimes said that the sort of 'social democracy' endorsed by these parties is fundamentally different from the sort of 'liberal democracy' favoured by liberal egalitarians.

Not everyone agrees that there is any significant distinction between 'social democracy' and 'left-liberal democracy'. Indeed, Rawls himself has said that his conception of justice can be described as either 'left liberal' or 'social democratic' (Rawls 1993*a*: 416). Conversely, many social-democratic parties in Western Europe have explicitly cited Rawls in developing and defending their platforms. In many cases, it seems that 'social democracy' and 'liberal equality' are simply different terms for the same core set of ideas, with European theorists preferring the former term, and North American theorists preferring the latter.

However, some commentators insist that social democrats have a more 'social' conception of justice, unlike the 'individualistic' conception of justice found in Rawls or Dworkin. David Miller, for example, distinguishes 'distributive equality', which he describes as individualistic and rooted in the liberal tradition, from 'social equality', which is more holistic or communitarian and rooted in the socialist tradition. The former is concerned with the claims of

individuals to their equal share of resources; the latter is concerned with constructing the right sort of egalitarian social relationships. The former is concerned with ensuring greater equality in people's private share of resources, the latter with ensuring people's equal standing in public life (Miller 1993; 1997).

Michael Walzer captures this 'social' aspect of equality with his image of a 'society of misters'. In a social democracy, people meet and greet each other on equal terms. We address each other as 'Mr' or 'Ms', rather than addressing upper-class people as 'sir' or 'madam', and lower-class people as 'Jones'. This ideal has also historically been phrased as the ideal of a 'classless' society, not in the Marxist sense of abolishing wage-labour, but rather in the sense that class position should not determine one's social relationships. As Miller puts it, a society of social equals is 'a community in which people's dealings with and emotional attachment to others are not inhibited by the barriers of class' (Miller 1993: 302). Similarly, the great English socialist Anthony Crosland argued that the goal of social justice is to 'weaken the existing deep-seated stratification, with its concomitant feelings of envy and inferiority, and its barriers to uninhibited mingling between the classes' (Crosland 1964: 77). Or as R. H. Tawney put it:

What is repulsive is not that one man should earn more than others, for where community of environment, and a common education and habit of life, have bred a common tradition of respect and consideration, these details of the counting-house are forgotten or ignored. It is that some classes should be excluded from the heritage of civilization which others enjoy, and that the fact of human fellowship, which is ultimate and profound, should be obscured by economic contrasts, which are trivial and superficial. (Tawney 1964: 113)

This idea of a more social conception of equality is often connected to the idea that there are different 'spheres' of justice. According to Walzer, for example, one sphere of justice concerns money and commodities, exchanged in the market. Goods and services available in the market should be distributed according to people's ability to pay, and Walzer thinks it is both impossible and unnecessary to try to eliminate involuntary inequalities in people's ability to pay for such goods. What matters is that these inevitable market-based inequalities do not cross the boundary and contaminate other spheres of justice, such as democratic citizenship, education, health care, or public honour, whose goods should be distributed without reference to one's ability to pay. Involuntary inequalities in people's ability to earn money and to buy private commodities, like boats or fancy stereos, are permissible, but these market inequalities must not enable people to buy political influence, basic public services, or public recognition, and thereby undermine equality in the public sphere (Walzer 1983).

This idea of developing a more social conception of equality, focused on the texture of people's social relationships rather than the 'details of the counting-house', is an important and attractive one. And it is not limited to the social democratic tradition. We find similar attempts to develop a more social or civic model of equality within utilitarianism, communitarianism and feminism.²² By contrast, most of the analytic Marxists we have examined in this chapter share the same 'distributive' focus as liberal egalitarians. The conceptions of justice advanced by Roemer, Elster, Arneson, and Cohen, like those of Rawls and Dworkin, are focused on determining the just claims of individuals.²³

But why should these be viewed as competing, rather than complementary, views of justice? One might think that the pernicious social consequences of material inequalities simply give us a further strong reason for wanting to achieve distributive justice. After all, one way to ensure that social relationships are egalitarian is to ensure that individuals have roughly equal shares of resources, and hence enter society on a roughly equal footing. If so, then liberal egalitarianism will help achieve both a just distribution to individuals, and egalitarian social relations between individuals.

Why then do some people think that 'social equality' is an alternative to, rather than supplement to, liberal equality? Why think that the only or best way to achieve social equality is to sacrifice distributive justice for individuals? There are at least three different answers here, I think.

The first is that some social democrats, like David Miller and Michael Walzer, simply do not accept the liberal-egalitarian argument that undeserved inequalities are unfair. On Miller's view, it is not unjust that the gifted have substantially more resources than the less talented. The fact that natural talents are morally arbitrary is not, for Miller, a reason to say that people do not deserve their market income (Miller 1999: ch. 7; cf. Walzer 1983: ch. 4). So we cannot justify redistributing resources on the grounds that the talented affluent have more than their fair share, or that the less well off have less than their fair share. On Miller's view, inequalities in market income may well be fair if they are broadly proportionate to people's contributions. However, these inequalities, while fair in and of themselves, may undermine the desired sense of 'fellowship' underlying a society of equals, and so must be limited and contained. A classless society is not necessarily more just, in the sense of distributing resources more fairly, but is attractive for reasons other than distributive justice, such as community.

Other social democrats, however, agree with liberal egalitarians that undeserved inequalities are unfair, but do not believe that the state is capable of identifying or remedying the growing inequalities in market income. Trying to fight these inequalities directly is a futile exercise. What the state can do, however, is to try to minimize the social consequences of these unjust

inequalities. It can try to ensure that these unjust inequalities only affect people's private lives—i.e. people's private consumption or leisure—without undermining social equality (Kaus 1992). On this view, social-democratic equality is a kind of fall-back position. If we cannot achieve distributive justice, we should at least protect social equality.

Yet others argue that even if we could remedy involuntary disadvantages in people's resources, this could only be achieved through means that would themselves erode social equality. As I discussed in the conclusion to Chapter 3, some theorists argue that liberal egalitarianism, even if defensible in theory, promotes the wrong *ethos* of equality (Wolff 1998; Anderson 1999). Trying to distinguish voluntary from involuntary disadvantages requires the state to view its disadvantaged citizens with distrust, as potential cheaters. And in order to overcome this distrust, the disadvantaged must engage in what Wolff calls 'shameful revelation'—i.e. they have to prove they do indeed suffer from some involuntary disadvantage, whether in their natural talents or childhood upbringing. The inevitable result, he argues, is to erode the sense of social equality between citizens. To avoid this problem, we should abandon the attempt to distinguish voluntary from involuntary inequalities, and instead focus on the question of which material inequalities undermine social equality (or what Anderson calls 'democratic equality'). If material inequalities do not violate social equality, we will allow them, no matter how undeserved. But if material inequalities do undermine social equality, we will remedy them, even if these inequalities are the result of voluntary choices (Anderson 1999).

So there are various reasons for thinking there is a potential conflict between the social-democratic pursuit of social equality and the liberal-egalitarian pursuit of distributive equality. It's worth noting that on all of these arguments, the social-democratic conception of equality is actually less demanding than liberal distributive equality. Whereas the liberal egalitarians seek to remedy a wide range of undeserved disadvantages in people's standard of living and access to goods and services, social democrats only seek to remedy these inequalities that erode people's standing as equals in public life. Liberal equality aims to ensure that people have an equal share of resources to pursue their conception of the good; social-democratic equality aims to ensure that people are respected as equals in society even though they may have a very unequal ability to pursue their conception of the good.

All of these arguments for social equality rightly stress the importance of people's social status or public standing. It is surely correct that the harm of poverty is not just the shortage of particular goods or services, but the shame, pity, condescension, or invisibility which poisons relations between the poor and other members of society. Contemporary liberal egalitarians and analytic Marxists have largely ignored this profound aspect of inequality. And there is some evidence that people are more willing to accept redistribution if it can be

seen as restoring social equality, not merely increasing someone's purchasing power.

And yet one could also argue that defenders of social equality are remarkably blasé about the importance of material resources in people's personal or private lives. There is a tendency to suggest that the 'details of the counting-house' are of no real consequence for people's lives, so long as they do not erode people's standing in the society of misters. But is it really unimportant that some people live in spacious houses while others are in cramped apartments; or that some people can afford month-long vacations overseas while others cannot afford to eat out at a local restaurant; or that some people have rewarding and fulfilling 'careers' while others have mind-numbing 'jobs', if they have a job at all? Why should we accept such large disparities in people's life-chances and standards of living when they are unchosen and undeserved? Why should we allow people's ability to pursue their conception of the good life to be dependent on such morally arbitrary factors?

It seems odd to defend the importance of social equality by denigrating the importance of individual equality. It may also be strategically unwise. For if we say that people are entitled to their unequal market incomes, then the affluent may resent having to give up some of 'their' money to ensure social equality for others, especially if no attempt is made to filter out those recipients who are responsible for their current disadvantage. People may be more willing to make sacrifices in the name of social equality than 'merely' distributive equality, but the evidence is overwhelming that people resent being taxed to support lifestyles they view as irresponsible (Bowles and Gintis 1999; Gilens 1999). So even if our aim is simply to protect social equality, we may still need to emphasize that the affluent do not deserve all of their wealth, and the less well off do not deserve their disadvantages.

Much work remains to be done in clarifying the relationship between social equality and distributive equality. It would be a mistake, I think, to suppose that these are inherently opposed ways of thinking about justice. In many cases, concerns about social equality will simply supplement and strengthen our commitment to distributive justice. But there may be other cases in which preserving social equality requires something more than, or other than, the pursuit of distributive equality.

4. THE POLITICS OF MARXISM

One of the most distinctive features of Marxism is its preoccupation with labour. This is true of both of the strands of Marxism we have examined in this chapter. The Kantian strand views work as the fundamental site of capitalist injustice (i.e. exploitation). The perfectionist strand views work as the

fundamental site of the socialist goal of non-alienation. But there is a third sense in which labour is fundamental to Marxism—namely, the fact that workers are identified as the main agents of social change. According to Marxist sociology, the struggle against capitalist injustice will take the form of a struggle between two increasingly polarized classes—workers and capitalists. Capitalists must oppress workers, for their wealth comes from the exploitation of workers, and workers must oppose capitalists, since they have nothing to lose but their chains. Class conflict is endemic to the wage relationship, which is endemic to capitalism, and so the wage relationship is the linchpin around which revolutionary struggle occurs. Other groups may be unfairly treated, but Marxists have viewed them as marginal in terms of both power and motivation. Only workers are able and willing to challenge the whole edifice of capitalist injustice. To concentrate on the fate of other groups is reformist, not revolutionary; since their oppression is less, and less essential, than the workers’.

Marxist theories of justice are, in large part, attempts to give the rationale for this class struggle. As Roemer puts it, ‘the purpose of a theory of exploitation is . . . to explain class struggle. As Marxists, we look at history and see poor workers fighting rich capitalists. To explain this, or to justify it, or to direct it and provide it with ideological ammunition, we construct a theory of exploitation in which the two antagonistic sides become classified as the exploiters and the exploited’ (Roemer 1982c: 274–5). And since the explanation of class struggle is located directly in the wage relationship, there has been a natural tendency for Marxists to locate the justification for socialism directly in the wage relationship. Thus we get theories of the inherent exploitation or alienation of wage-labour.

It is increasingly difficult to accept this traditional Marxist view about the centrality of labour to progressive politics. Many of the most important contemporary struggles for justice involve groups which are not, or not only, oppressed by the wage relationship—e.g. racial groups, single mothers, immigrants, gays and lesbians, the disabled, the elderly. As we’ve seen, support for these groups may in fact conflict with the labour-emphasizing arguments for socialism. Marxists have tended in practice to support the claims of these non-proletarian groups. They have tended to support the needy, whether or not their needs are related to any labour-based principle of alienation or exploitation. But as Cohen points out, they have often justified doing so by treating ‘the set of exploited producers as roughly coterminous with the set of those who needed the welfare state’s benefits’ (Cohen 1990a: 374). In other words, while Marxist theory has been labour based, its practice has been needs based, and the obvious inconsistencies have been papered over by assuming that the needy are also the exploited.

However, it is increasingly clear that the needy and the Marxian exploited

are not always the same people. This ‘forces a choice between a principle of self-ownership embedded in the doctrine of exploitation and a principle of equality of benefits and burdens that negates the self-ownership principle and which is required to defend support for very needy people who are not producers and who are, a fortiori, not exploited’ (Cohen 1990a: 13–14; cf. Arneson 1993a). I have argued that it is arbitrary, at the level of theory, to endorse the ‘fetishism of labour’ implicit in the doctrines of exploitation and alienation (Roemer 1985b: 64). But it is also unhelpful at the level of practice, for it neglects forms of injustice which motivate some of the most important contemporary progressive political movements. If there is to be an effective movement for radical social change, it will have to involve a coalition of both the needy and the exploited. But the rhetoric of Marxist exploitation and alienation does not speak to the needs of non-labourers, and may indeed oppose them.

Marxists pride themselves on their unity of theory and practice. But their theory betrays their practice. Faced with the choice between self-ownership and distributive equality, Marxists have, in practice, embraced equality, and have done so in a much more committed way than liberals have. But at the level of theory, Marxists remain committed to a fetishism of labour that is in some ways less radical, and less attractive, than liberal egalitarian theories of justice, and this has hampered the quest for an effective radical movement. A genuine unity of theory and practice may require a greater unity of Marxism and liberal equality.

GUIDE TO FURTHER READING

Most of the interesting philosophical work on Marxism in the last twenty-five years has been done by a group of scholars known as ‘analytical Marxists’, who seek to explore and reconstruct Marxism using the tools of Anglo-American analytical philosophy. The major exponents of this school of thought include G. A. Cohen, Jon Elster, Philippe Van Parijs, and John Roemer. We have already encountered many of these names in the chapter on liberal egalitarianism, since their reconstructions of Marxism have taken them in the direction of liberal egalitarianism. For helpful overviews of this movement, see John Roemer (ed.), *Analytical Marxism* (Cambridge University Press, 1986); the special issue of the *Canadian Journal of Philosophy* on ‘Analyzing Marxism: New Essays on Analytical Marxism’ (supplementary vol. 15, 1989); and Lesley Jacobs, ‘The Second Wave of Analytical Marxism’, *Philosophy of Social Sciences*, 26/2 (1996): 279–92. For a critique, see Marcus Roberts, *Analytical Marxism: A Critique* (Verso, 1996). This approach is also sometimes called ‘rational choice Marxism’, since it draws in part on neoclassical models of rational choice theory. Hence Terrell Carver and Paul Thomas (eds.), *Rational Choice Marxism* (Pennsylvania State University Press, 1995).

The key texts of this school of thought include: G. A. Cohen’s *History, Labour, and*

Freedom: Themes from Marx (Oxford University Press, 1988); *Self-Ownership, Freedom and Equality* (Cambridge University Press, 1995); and *If You're an Egalitarian, How Come You're So Rich?* (Harvard University Press, 2000); Jon Elster, *Making Sense of Marx* (Cambridge University Press, 1985); Philippe Van Parijs, *Marxism Recycled* (Cambridge University Press, 1993); and John Roemer's *Free to Lose: An Introduction to Marxist Economic Philosophy* (Harvard University Press, 1988); and *Theories of Distributive Justice* (Harvard University Press, 1996).

Although many analytical Marxists have embraced some form of liberal egalitarianism, there is still interest in developing some distinctly socialist or social-democratic form of egalitarianism. Some analytic Marxists seek to identify distinctive institutional mechanisms for achieving equality, such as market socialism. While there is growing recognition that any efficient and fair society must allow some room for markets, market socialism would set greater limits on either the capital or labour markets than liberal egalitarianism. For investigations of the idea of market socialism, see Pranab Bardhan and John Roemer (eds.), *Market Socialism: The Current Debate* (Oxford University Press, 1993); Roemer's *A Future for Socialism* (Verso, 1994); and Bertell Ollman (ed.), *Market Socialism: The Debate among Socialists* (Routledge, 1998).

Other theorists attempt to develop a distinctly socialist philosophical foundation for equality. Some theorists argue that the social-democratic tradition offers an alternative account of equality, emphasizing 'social equality' (or 'civic/democratic' equality), as distinct from the individual 'distributive equality' emphasized by liberalism. Important versions of this ideal include Michael Walzer, *Spheres of Justice: A Defence of Pluralism and Equality* (Blackwell, 1983); David Miller, *Principles of Social Justice* (Harvard University Press, 1999), ch. 11; Elizabeth Anderson, 'What is the Point of Equality?', *Ethics*, 99/2 (1999): 287–337; and Mickey Kaus, *The End of Equality* (Basic Books, 1992).

For other recent attempts to imagine a post-Marxist socialist conception of equality, see Andrew Levine, *Rethinking Liberal Equality from a 'Utopian' Point of View* (Cornell University Press, 1998), and Jane Franklin (ed.), *Equality* (Institute for Public Policy Research, 1997), which is an attempt by leading left intellectuals in Britain to reinterpret the meaning of socialism for 'New Labour' in Britain.

Two journals which regularly publish debates in analytical Marxism are *Politics and Society* and *New Left Review*.

Analytical Marxism has arguably departed a great deal from the views of Marx himself. For a comprehensive overview of the debate over whether Marx himself had an implicit or explicit moral theory, see Norman Geras, 'The Controversy about Marx and Justice', in A. Callinicos (ed.), *Marxist Theory* (Oxford University Press, 1989); Geras, 'Bringing Marx to Justice: An Addendum and Rejoinder', *New Left Review* (1993), 195: 37–69; and Rodney Peffer, *Marx, Morality and Social Justice* (Princeton University Press, 1990). For an excellent introduction to Marx, and his relation to contemporary analytical Marxism, see Terrell Carver (ed.), *The Cambridge Companion to Marx* (Cambridge University Press, 1991).

For a comprehensive website on all things Marxist, see the 'Marx-Engels Archive' at www.csf.colorado.edu/psn/marx/

NOTES

1. While both liberal egalitarians and Marxists share a commitment to material equality, they disagree over the means which can be used to pursue it. If a society is in violation of the difference principle, but respects civil rights, then Rawls and Dworkin deny that we can limit civil liberties in order to correct the material inequality. By contrast, some Marxists would be prepared to accept more radical means to achieve distributive justice (see Ch. 3, n. 23).

2. In fact, important aspects of Dworkin's approach were foreshadowed in James Dick's account of 'compensatory justice', which argues that inequalities in resources are legitimate if they compensate for differences in the burdens people face (Dick 1975). According to Dick, people whose work involves special risks or hardships are entitled to greater pay than those whose work is safe and enjoyable. The aim, on his view, is to achieve an equal distribution of both benefits and burdens. Under plausible market conditions, this view is likely to collapse into Dworkin's equality of resources view: the former's account of 'burdens' is really just the flip side of the latter's account of 'expensive preferences', both of which are determined by market mechanisms under conditions of equal resources (Carens 1985).

3. Compare the proposals discussed at the end of Chapter 3 with recent work on market socialism, such as Bardhan and Roemer 1993; LeGrand and Estrin 1989; Miller 1989. The clear overlap here is reflected in the fact that Roemer's proposal for equalizing share ownership is sometimes described as 'coupon capitalism' and sometimes as 'market socialism'.

4. One of the leading analytic Marxists, G. A. Cohen, provides a fascinating autobiographical discussion of this shift in his own views. He was raised to believe in the inevitability of communist equality, but having lost that faith, he now emphasizes the need to persuade people of its moral desirability (Cohen 2000).

5. The idea of moral equality often appears in Marx in the same form as it appears in Kant, Rawls, and Nozick—i.e. as the requirement that we should treat people as ends in themselves, not means. He thought that capitalism failed to treat people as ends both in the relations of production (where the capitalist labour process reduces the worker to the status of a thing, an instrument, to be exploited by the capitalist), and in the relations of exchange (where 'each views the needs and desires of the other not as needs and desires, but rather as levers to be manipulated, as weaknesses to be preyed upon'—Buchanan 1982: 39).

6. Marx says that life under communism would be a 'social life' (Marx 1977a: 90–3), and that communist individuals would be 'social individuals' (Marx 1973: 705, 832). But he did not say that there will be an inherent harmony of interests, nor that we should aim at creating such a harmony. For my view of what these claims amount to, see Kymlicka 1989a: ch. 6.

7. e.g. Sandel 1982: 30–3; Glendon 1991; Etzioni 1993; Hardwig 1990. Waldron 1993: 370–91 offers a more subtle view, arguing that while notions of rights and justice are unnecessary when affection exists, they are necessary to deal with situations where affection fades.

8. For the way good marriages (and good friendships) combine justice and love, see Okin 1989b; Kleingeld 1998; Friedman 1993. For discussions on the way we manifest our ethical values in our decisions about whether or when to exercise our rights, see Tomasi 1991, 2001: ch. 3; Meyer 1997. For defences of the centrality of rights to any desirable conception of community, see S. Walker 1998; Ignatieff 2000; Dworkin 1989.

9. As I noted at the beginning of the chapter, Marxists have historically raised other objections to justice. For example, appeals to justice were said to be strategically divisive, due to the essential contestability of the idea of justice, and unnecessary, since the motor of history is the rational interest of the disadvantaged. Also, conceptions of justice were said to be ideological, shaped to suit existing property relations, and hence a socialist conception of justice must

follow, rather than precede, changes in property relations. Many of these supposed defects of justice are premised on Marx's now-discredited theory of historical materialism. For the ideology objection, see Wood 1981: 131–2; Brenkert 1983: 154–5; Wood 1972: 274, and the response in Geras 1989: 226–8; Nielsen 1989; Arneson 1981: 217–22; Norman 1989. For the role of moral motivation in class struggle, see Wood 1984; Miller 1984: 15–97; and the response in Geras 1989: 251–4; Nielsen 1987.

10. Compared to the voluminous literature by analytic Marxists on justice, there is still comparatively little work done on developing a Marxist theory of democracy. For a notable exception, see Gilbert 1980; 1991.

11. Reiman denies that compulsory aid to the disabled is exploitative because it can be seen as an insurance policy that everyone buys, and so is 'an indirect return to individuals of labour equal to what they contribute, and thus not altering the basic distributive principle' that no one is made to work for anyone else (Reiman 1989: 312 n. 12). But this is clearly false of many recipients of such aid—e.g. the congenitally infirm. Holmstrom, who like Reiman defines exploitation in terms of 'forced, unpaid, surplus labour' (Holmstrom 1977: 358), says that support for the infirm is not exploitative, because 'The surplus is under the control of those who produce it. There is no class of non-producers who appropriate what workers have produced. Workers do not consume it all, but they control it as a class' (363). But the fact that workers control it *as a class* does not show that *individual* workers are not forced to hand over surplus product to others. What if I, as an individual worker, object to what the working class as a whole decides to do with the surplus product? Can I insist that I get the full value of what I have produced? If not, and if I must work to earn a living, then I am exploited on her definition. Moreover, what if there is a constitutional guarantee of welfare rights, under which workers are legally required to support the infirm? Then, under her definition, the working class as a whole is exploited, since they do not legally control the entire surplus.

12. For an interesting attempt to reformulate Marx's surplus value conception of exploitation to apply to women's unpaid caring activities, see Bubeck 1995: ch. 2.

13. Roemer tries to avoid this implication by adding a 'dominance condition' (Roemer 1982a: 237), or the requirement that there be no 'consumption externalities' (i.e. the workers must not get any pleasure from helping the disabled) (Roemer 1989: 259). But these are ad hoc, since they are disconnected from the 'ethical imperative' he identifies as the basis of exploitation theory (as he admits—Roemer 1982c: 277 n.). Indeed, they seem to be question-begging attempts to disavow the libertarian content of exploitation theory, and to block libertarian claims that the welfare state is exploitative (Bertram 1988: 126–7).

14. As Arneson notes, this account of why the exploitation of an impoverished worker is wrong also explains why it is wrong for a capitalist to let his factory be idle, leaving the worker to starve (Arneson 1993a: 288). By contrast, the traditional Marxist account of exploitation would imply that the owner who closes his factory is no longer exploiting anyone.

15. Similarly, Van Parijs has extended the notion of exploitation to cover the case of inequality between rich and poor countries (what he calls 'citizenship-exploitation'), and even the case of inequality between job-holders and the jobless (what he calls 'job exploitation') (Van Parijs 1993: 143–7, 123–30).

16. Roemer has, in places, moved away from this assimilation of injustice and exploitation. In order to match our everyday sense that exploitation involves someone taking advantage of another, he adds the following proviso: not only must the exploited group fare better by withdrawing with its talents and per capita share of resources, the exploiters must fare worse if the exploited withdraw with their existing resources (Roemer 1982b: 285). Where this added condition is not met, groups that are denied equal access to resources are 'Marxian-unfairly treated', but not 'exploited', for others do not take advantage of them ('they could disappear

from the scene and the income of others would not change'—Roemer 1982b: 292). But, as he admits, this added condition still fails to capture our intuitive sense of 'taking unfair advantage' (Roemer 1982b: 304 n. 12; cf. Elster 1982a: 366–9). In a subsequent book, Roemer returns to his original definition of exploitation as 'the loss suffered by a person as a result of the unequal initial distribution of property' (Roemer 1988: 134), whether or not this loss comes about from being taken advantage of. Hence a person is capitalistically exploited 'if he would gain by virtue of an egalitarian redistribution of society's alienable means of production' (Roemer 1988: 135), and the unemployed are as exploited as wage-workers under this test.

17. Paul Warren argues that even if there are 'clean routes' to wage-labour relations, it would still be permissible to prohibit them as exploitative, since the employer both exercises unequal power over the relationship, and gains disproportionately from the relationship. Even if the inequality in resources between employer and employee is legitimate (i.e. due to voluntary choices), it would be wrong to allow the employer to take advantage of the legitimate inequality in this illegitimate way (Warren 1997). Warren's article makes it sound as though the need to gain employment is an unexpected and unwelcome consequence of the (voluntary) inequality in resources, from which the would-be worker needs protection. This is misleading. *Ex hypothesi*, both parties faced the same set of options, including the opportunity to become an employer or co-owner by making the necessary choices regarding savings, investment, and risk. The would-be worker made different choices, since she had other goals in life, perhaps involving greater leisure, consumption, or security, knowing that this would require her to work for others. The decision to become a worker was part of the option she chose, in preference to other options, including the option to become an employer. In other words, decisions about employment are already factored into the envy test. In any event, people in a liberal society are free to enter into relations of unequal power and unequal rewards—indeed, many (most?) forms of human association involve this to some degree. There is no requirement that organizations in a liberal society (churches, charitable organizations, political parties) be organized so as to either equalize the power of all members, or reward people according to their labour expended. What matters is that people make these choices about what kinds of relationships to enter from a position of equal resources, and that is present in the 'clean route' to wage-labour.

18. For Roemer's attempt to refute the argument, see Roemer 1988: 149–56. His main objection is that even if we equalize resources, the differential ownership of capital which would arise from people's choices would largely reflect the lingering influence of earlier injustice. Those people who were born into poor families will not be taught the habits of risk-taking and deferred gratification which are passed on within rich families. Different preferences concerning work and leisure do not justify differential ownership of the means of production, because the preferences themselves were formed under conditions of injustice (Roemer 1988: 62–3, 152–3; 1985b: 52). This is a valid point—people are fully responsible for their choices only when their preferences are formed under conditions of justice (cf. Rawls 1979: 14; Arneson 1981: 205; Scanlon 1988: 185–201). But this hardly defends a blanket prohibition on private property. It suggests that, for a generation or two, we must attend to, and perhaps compensate for, this influence. Perhaps we could implement an affirmative action programme to encourage previously disadvantaged groups to acquire and pass on the relevant dispositions. This does not undermine the general principle that different ambitions can legitimately give rise to differential ownership of the means of production.

19. Some socialists who accept the principle that distributions should be ambition-sensitive are nonetheless concerned to limit the kinds of inequalities it generates. For example, some say that extensive differences in income would violate self-respect (Nielsen 1978: 230; Daniels 1975a: 273–7; Doppelt 1981: 259–307; Keat 1982: 68–70; but cf. Rawls 1971: 107; DiQuattro 1983:

59–60; Gutmann 1980: 135–8), or would undermine the conditions necessary for developing a sense of justice (Clark and Gintis 1978: 315–16), or a sense of solidarity (Crocker 1977: 263). I doubt that these problems would arise for income differences which pass the envy test (how can the greater resources of others violate my self-respect when they accompany a lifestyle that I did not want and freely rejected?). Some say that extensive income inequality would undermine the equality of political power necessary for democracy (Daniels 1975a: 256–8), or would create unequal opportunities for children (Nielsen 1985: 297–8). These are serious worries, but they are recognized by Rawls and Dworkin, who agree that they impose constraints on legitimate inequalities (re political equality, see Rawls 1971: 225–6; Dworkin 1988; re unequal opportunity, see Rawls 1971: 73). For further socialist views on ambition-sensitivity, see Nielsen 1985: 293–302; Elster 1985: 231–2, 524; 1992: 237–40; Levine 1988: 53; 1999.

Carens argues that the central difference between socialists and liberals involves, not the needs principle, but the other half of Marx's famous slogan ('from each according to his abilities, to each according to his needs'). Carens takes this as imposing a duty on people to contribute, a duty to make 'good use' of their talents, whereas liberals think this could enslave the talented by forcing them to do something they are good at but do not enjoy (Carens 1986: 41–5). I do not believe that most Marxists actually share Carens's duty-imposing interpretation of Marx's slogan, but it is an important issue that deserves more discussion.

20. Lukes also distinguishes a 'utilitarian' strand in Marx's thought, but I will leave this aside, partly because we have already examined utilitarianism, and partly because this strand of Marx's thought has had less influence on contemporary Marxists than the Kantian and perfectionist strands. Moreover, I doubt there was a utilitarian strand in Marx's thought. He rejected the idea that a person can be harmed just because that would increase the overall good (Murphy 1973: 217–20; but cf. Allen 1973; Brenkert 1981).

21. Marx himself once claimed that 'the realm of freedom really begins only where labour determined by necessity and external expediency ends; it lies by its very nature beyond the sphere of material production proper' (Marx 1981: 958–9). This is not his usual view of the matter, nor is it shared by most contemporary Marxists (e.g. Cohen 1978: 323–5), but it is surely true that the 'development of human powers as an end in itself' can occur outside production, and that 'nothing in the nature of things prevents the sphere of leisure from becoming the main arena for that free many-sided development of the individual that Marx prized' (Arneson 1987: 526).

Even if we accept the emphasis on production as the arena of self-fulfilment, there are other values besides non-alienation at stake. Marxists say that the value of production lies in 'the development of human powers as an end in itself'. But some people think that the value of productive labour lies in contributing to an organization that efficiently serves vital needs. For such 'service-oriented' workers, workplace democracy may be a 'wasteful self-indulgence' which places the welfare of the worker above that of the recipients (Arneson 1987: 525). Perfectionists argue that work is only meaningful if there is worker democracy (Nielsen 1978: 239; Schwartz 1982: 644). But what is wrong with caring more about what gets done than about how it gets done? There is a plurality of goods to be gained from labour—Arneson lists seventeen of them—of which the free development of one's talents is just one, and different goods flourish best under different systems of work organization and property-ownership (Arneson 1987: 527). So there is no simple correlation between socializing productive assets and increasing the value of our productive activities.

22. Similar distinctions between 'social/civic' equality and 'individualistic/distributive' equality are made by utilitarians (Temkin 1993: chs. 9–10; Broome 1991: ch. 9); communitarians (Sandel 1996); and feminists (Young 1990; Tronto 1993).

23. However, there are also some liberals and Marxists who have argued for a more 'social'

conception of justice and equality. For example, Mickey Kaus argues that liberals should abandon what he calls 'money liberalism' (or distributive equality) for what he calls 'civic liberalism' (or social equality) (Kaus 1992). Similarly, Reiman argues that analytic Marxism should 'take as its ideal not some distribution of things but a certain social relation among persons' (Reiman 1991: 158; cf. Reiman 1989).