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UNIVERSITY OF CALGARY

An Epistemic Theory of Global Injustice

by

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A THESIS

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Abstract

I take the human costs of global poverty to demand serious political reflection. I argue for a diverse consensus among theories of justice on a set of obligations toward the global poor that we, sadly, fail to fulfill. I analyze this moral failure, developing an account of it that highlights structural flaws in the flow of information relevant to our moral relations with the global poor. I conclude that proper attention to the flow of information within global society is an imperative of global justice.

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List of Abbreviations

General Agreement on Trade and Tariffs (GATT)

Gross National Income (GNI)

Human Development Index (HDI)

Human Immunodeficiency Virus (HIV)

International Monetary Fund (IMF)

Multi-Dimensional Poverty Index (MPI)

Non-Governmental Organization (NGO)

Organization for Economic Cooperation and Development (OECD)

Purchasing Power Parity (PPP)

United Nations (UN)

United Nations Development Programme (UNDP)

World Bank (WB)

World Health Organization (WHO)

World Trade Organization (WTO)

1. Introduction

1.1 Political Reflection and the Human Costs of Global Poverty

Numerous events in our shared human history have been taken to demand serious political reflection. The history of religious strife between Christians in Europe led to political reflection that questioned the union of church and state. World Wars I and II opened the eyes of the world to the threat of extreme nationalism and fascism. Marx took the plight of the workers under capitalist controlled industrialization as an opportunity for serious political reflection on the ills of capitalism. Often the intensity of the political reflection demanded from such events is proportional to their human costs. It is the death and suffering from religious and international war, and the poverty endured by the working class that demanded serious questions be raised regarding how we best live together in societies. I take these historical political reflections to be important steps toward our shared understanding of justice. For the political thinkers that attempted to wrest meaning from these events, proper reflection was not just a matter of (re)interpretation based on already well established political thought. Often, reflection on these historical circumstances gave rise to new and radical political questions (and answers) and sometimes, to entirely new political theories. We should thus be diligent in heeding the demands of political reflection that the many historical instances of great human suffering lay upon us. Therein waits important progress in our political thought.

In this essay, I will undertake a reflection on one such history of suffering that I believe has only recently begun to be duly treated as a focal point of serious political reflection. Since the end of the Cold War, approximately 270 million people have died under conditions of extreme global poverty (Pogge, 2005, p. 1). In this same timeframe, billions of people

have lived their entire lives on less than \$2/day (The World Bank, 2014).¹ In terms of human costs, few historical events rival the death and deprivation caused by extreme global poverty. It is my motivating intuition that, like our past political reflections, a solemn study of our moral failures toward the global poor² can yield new and important perspectives on our evolving understanding of justice.

1.2 Ideal and Non-Ideal Political Philosophy

As I take this work to be a project in non-ideal theory, and since the distinction between ideal and non-ideal political philosophy is still being debated, I will briefly comment on what I take this distinction to amount to. One way this distinction can be understood is by contrasting the kind of questions that these two methodologies take as their starting points for political thought. The central question of ideal theory, since Plato, has been ‘What is Justice?’ and answers to this question have given rise to the many theories of justice to be discussed in §3. In contrast, the central questions of non-ideal theory have been those aimed at the resolution of injustice as manifest in the actual world. How should we undo the injustices of racism/sexism/capitalism? In this sense, non-ideal theory eschews the central question of ideal theory (What is Justice?) as the injustices in question are such that a complete theory of justice is not required (or helpful) in combating them.³

I do not take the injustice of global poverty to be completely obvious (nor do many political philosophers). As such, I will argue that we have obligations of justice to the global poor. But I will not do so by addressing the question ‘What is Justice?’ head on. Following the non-ideal approach, I agree that we do not need to settle on some one complete theory

¹The \$2 amount is in units of United Nations Purchasing Power Parity (PPP) (United Nations, 2007)

² Though there are many ways in which a person can be said to be poor, my primary concern in this work will be economic poverty.

³ For example, see Anderson’s critique of the contractualist tradition’s inability to account for race based injustice (Anderson, 2010, p. 5).

of justice in order to make progress in understanding the injustice of global poverty. Thus, the methodology embraced in §3 is one of finding common ground among a range of theories of justice, rather than arguing for any one theory in particular as the correct delineation of our obligations of justice to the global poor. A robust familiarity of the facts surrounding our moral obligations with the global poor is necessary to properly assess the content of those obligations, and this is the purpose of §2. In the remainder of the essay, I follow Elizabeth Anderson's guide of the non-ideal methodology:

In non-ideal theory, normative inquiry begins with the identification of a problem [§2-4]. We then seek a causal explanation of the problem [§5] to determine what can and ought to be done about it, and who should be charged with correcting it. This requires an evaluation of the mechanisms causing the problem [§6], as well as the responsibility of different agents to alter these mechanisms. (2010, p. 22)

1.3 Outline

In Chapter 2, I begin by reviewing a set of facts relevant to our moral relations with the global poor. These facts motivate the exploration of the content of our obligations of justice to the global poor, and ensure that these obligations are factually informed in the way that non-ideal theory demands.

In Chapter 3, I argue that while a broad range of theories of distributive justice may differ regarding the *full* set of obligations they detail to the global poor, there is nonetheless a common core of support for at least three obligations to the global poor. These obligations are a minimal set that aim to ensure the global poor have sufficient means to meet their basic needs, attain an adequate level of wellbeing, and participate in a set of global institutions that are minimally fair.

In Chapter 4, I ask of the obligations detailed in Chapter 3, 'Are we fulfilling these obligations?' I argue that the answer, sadly, is no. I present facts regarding the

performance of these obligations, and argue that the gulf between what has been done, and what could have been done, is too great for us to be said to have fulfilled these obligations.

In Chapter 5, I pose the central question of this work: Why do we fail in our obligations of justice to the global poor? I explore two kinds of moral failure, identify my focus on epistemic moral failure, and lay the theoretical groundwork for an epistemic theory of our moral failures toward the global poor. I claim that we fail in our obligations to the global poor (at least in part) because we are ignorant of, misinformed regarding, or heavily and inappropriately discounting of, information that is relevant to the fulfillment of those obligations.

In Chapter 6, I further develop the thesis that we fail epistemically in our obligations of justice toward the global poor by identifying three mechanisms of epistemic moral failure. These three mechanisms are structural flaws in the flow of information within global society. I present evidence and argument that each mechanism is not only theoretically well grounded, but operative in our actual moral relations with the global poor.

In Chapter 7, I turn to the question ‘How can we avoid moral failure in the future?’ I consider two answers to this question that are revealed as inadequate given the plausibility of epistemic moral failure, and comment on the prospects of combating this type of failure.

I conclude that the plausibility of epistemic moral failure in our obligations of justice toward the global poor demands that we treat the task of properly managing the flow of information within global society as an imperative of global justice.

2. Death, Aid, Debt, Trade

In this chapter, I will present facts in four select areas that are pertinent to our moral relations with the global poor. These facts motivate, and provide the background for an analysis (in the next chapter) of the content of our obligations to the global poor.

2.1 Poverty as a cause of death among the global poor

Deaths due to poverty related causes are estimated at 18 million persons per year (World Health Organization, 2004). Poverty related causes include communicable diseases, respiratory infection, maternal and perinatal conditions, and nutritional deficiencies. These causes are ordered by prevalence. Roughly 10 million die per year due to infectious and parasitic diseases like tuberculosis, HIV, and malaria that have well known treatment methods that are unaffordable or unavailable. Roughly 4 million die from respiratory infections that antibiotics could combat but which, again, are not affordable or available. Roughly 3 million die from poor maternal and perinatal conditions and nutritional deficiencies resulting from a lack of basic health services and food insecurity, respectively.

Such causes disproportionately affect young persons. To capture this fact, the World Health Organization (WHO) has created a ‘years of life lost’ statistic that assigns greater statistical weight to deaths at an earlier age. Assessing deaths using this metric reveals that 69% of ‘years of life lost’ in low-income countries were due to poverty related causes, compared to only 8% in high-income countries (World Health Organization, 2010).

In short, poverty is deadly. It exposes the poor to the effects of lethal diseases and infections that, with modern medical advances, are otherwise preventable or treatable at moderate cost. It disproportionately threatens young mothers and children.

2.2 Global inequality and the ability to effectively aid

Beyond the issue of mortality due to poverty, there remains the problem of diminished wellbeing for the global poor. Billions of people live on less than \$2/day. This economic deprivation means that the global poor lack access to the means to actualize their view of the good life. For example, they lack access to education and to the opportunity to enjoy leisure time. To help capture this problem, the United Nations (UN) Development Program uses a metric known as the Human Development Index (HDI), which is:

... a composite index measuring average achievement in three basic dimensions of human development—a long and healthy life, knowledge and a decent standard of living. (United Nations Development Programme, 2014)

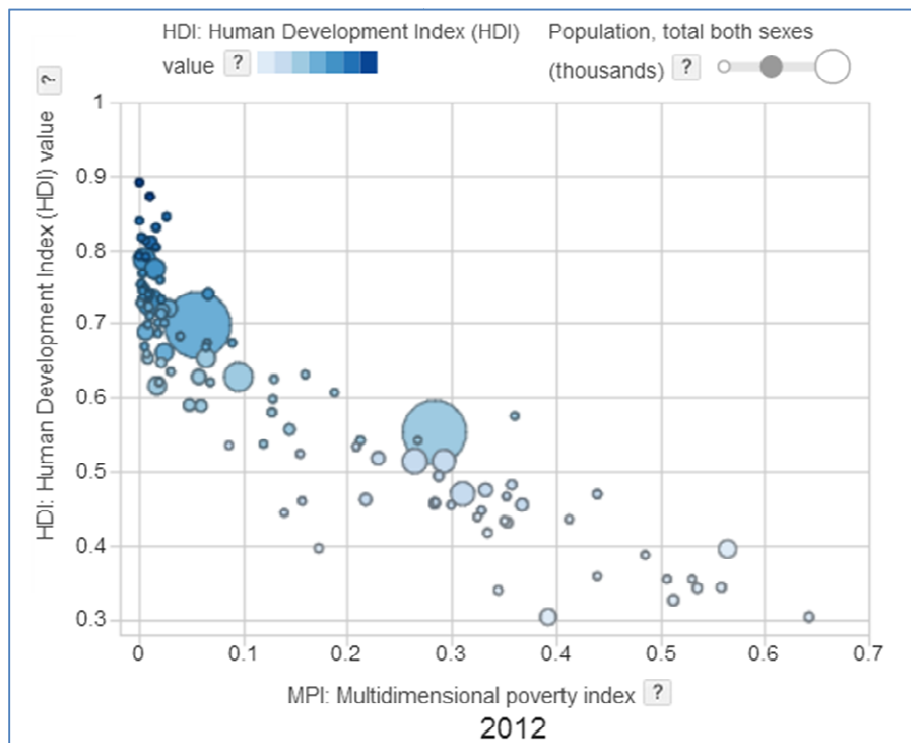


Figure 2–1: HDI vs. Multi-Dimensional Poverty Index (United Nations Development Programme, 2014)

An HDI score of 1.0 is excellent human development, meaning that the country scores extremely well in health, education, and standard of living. Viewing this metric against the

UN's Multi-Dimensional Poverty Index (MPI)⁴ reveals a strong country-based correlation between diminished human development and increased poverty.⁵

The facts regarding poverty's role in reduced life expectancy and diminished wellbeing have motivated the view that one of our primary moral relations with the poor is a duty of aid. Since we have the ability to aid, and the poor are in need of aid, we ought to give it (Singer, 1972) (Lichtenberg, 2013, pp. 19-21). There are generally three routes through which the rich aid the poor. Multi-lateral aid is offered through international institutions such as the United Nations. Bi-lateral aid (also called Official Development Assistance) is aid given directly from one country to another; such as when the United States provides aid to the government of Afghanistan to improve hospitals in Kabul. Finally, non-governmental organizations (NGO's) such as Oxfam and the Red Cross solicit donations from individuals and use these funds to provide services and fund projects in poor countries.

Two issues surrounding aid are relevant to our moral relations with the global poor. First is the amount of aid that is given, and whether this amount is adequate. Second is whether aid is an effective means to reducing global poverty.

The oft cited target for Official Development Assistance (ODA) offered by rich nations is 0.7% of Gross National Income (GNI) (OECD, 2014). This target was set as a reasonable goal for wealthy countries to meet, and captures the idea that a country's contribution in aid should be proportional to their relative wealth. Only a handful of countries meet this goal (OECD, 2012), and aid is not directed toward the least developed countries (LDCs) where it is needed most (see Figure 2-2).

⁴ Multi-Dimensional Poverty Index (MPI) is a composite measure of the percentage of deprivations that the average person would experience if the deprivations of poor households were shared equally across the population (United Nations Development Programme, 2014).

⁵ Bubble sizes represent the populations of the individual countries that act as data points.

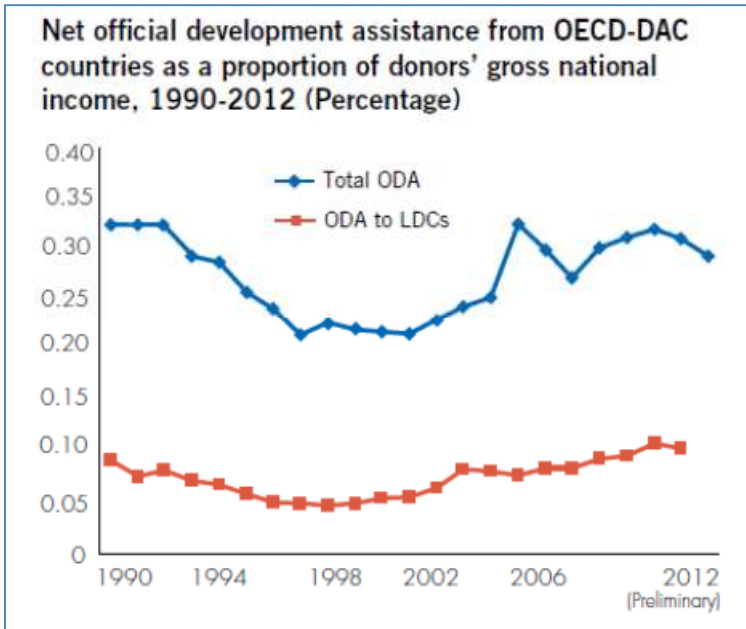


Figure 2–2: Net ODA as % of GNI from OECD Countries (United Nations, 2013b)

Beyond the issue of how much aid is given is whether this aid is effective at combating poverty. Criticisms have been directed at all forms of aid, usually motivated by instances of mismanagement, corruption, or lack of any measurable reduction in poverty due to aid. One might take these failures to support the cessation of aid. This conclusion seems much too harsh to me. The clear lesson seems to be that aid must be more effective (giving no aid would be completely ineffective), and we need commit to a (partially philosophical) debate regarding what effective aid is and how we are to measure it.⁶

These criticisms of aid are valid, however, in their acknowledgement of a broader institutional structure which often goes unrecognized in deliberations about our moral relations with the global poor. These structural considerations are the focus of the next two sections.

⁶ For an excellent discussion of this issue, see (Hassoun, 2012, pp. 123-142)

2.3 Debt and international financial institutions

Many poor countries have taken on large debts since the 1970's (Ndikumana & Boyce, 2011, p. 32). Multi-lateral loans were administered by global institutions such as the World Bank and International Monetary Fund (IMF). Bi-lateral loans were administered by nationally affiliated official creditors, and private loans were issued by commercial banks and lenders. Debt service payments to all types of loans eat away at national budgets in poor countries, diverting monies that could otherwise be spent on basic health, education, or improved governance. Instead, these funds benefit lending institutions that are owned and controlled by the rich (Ndikumana & Boyce, 2011, pp. 74-83).

One moral concern surrounding these debts is that they are arguably illegitimate, or odious. Loans were issued to authoritarian or despotic governments and monies were used for the personal benefits of elites, rather than legitimate public expenditures. For example:

‘Nigeria owes \$34 billion, much of it in penalties and compound interest imposed on debts that were not paid by the military dictatorship of the 1980's and early 1990's,’ finance minister Ngozi Okonjo-Iweala observed in January 2005. (Ndikumana & Boyce, 2011, p. 15)

Even if countries recover from such regimes, they are still burdened with the debt that was incurred without democratic consent. Thomas Pogge has referred to this as the ‘international borrowing privilege’ whereby the ruling members of a given country, democratic or otherwise, are treated by the international financial community as capable of entering into long-term financial contracts on behalf of their citizenry (Pogge, 2008, pp. 114-115).

Another concern is the decision-making structure within multi-lateral financial institutions such as the World Bank and IMF. These institutions have been criticized for being highly undemocratic (Krishnamurthy, 2014, pp. 6-8). Votes cast on governance issues

are weighted based on economic status of member states, meaning that more powerful countries such as the US have much more say in the workings of the organization. This democratic deficit leads to problematic policies such as 'loan conditionality', where loan funds are conditioned on the acceptance of domestic economic reforms by debtor countries that have little influence over the choice of such reforms:

The economic policies associated with the IMF and the World Bank's loans [i.e. loan conditionalities] are not chosen by the borrowing countries' elected officials; they are usually determined by economists who work for the IMF and the World Bank, who, in turn, are greatly influenced by the United States and other developed countries who have the greatest power over decision-making. (Krishnamurthy, 2014, p. 10)

The economic reforms these loans are conditioned on have been criticized as further hindering poor country development rather than helping it (Krishnamurthy, 2014, pp. 5-6).

2.4 Trade and international economic institutions

Along with the World Bank and IMF, the World Trade Organization (WTO) has its roots in the Bretton Woods Conference of 1944. Known then as the General Agreement on Tariffs and Trade (GATT), it was created to coordinate trade liberalisation in the post WWII era. Today, the WTO has developed into the predominant global institution in the realm of international trade. The WTO facilitates trade negotiations among its member states, both rich and poor. The negotiations – also called rounds – have been criticized as undemocratically dominated by rich countries (Goldstein, 2008, p. 166). In response, the WTO's consensus based agreement structure is often argued to be superior to that of the World Bank or IMF (as discussed in §2.3), over which rich countries like the US exert considerable power. However, the legitimacy of the agreements reached through WTO negotiations is suspect given that the least developed countries agree to them while in a position of incredibly weak bargaining power. For example, poor countries desperate for

economic growth through inclusion in the global trade structure have resisted the establishment of labour and environmental standards for domestic industries that seem to be in their populace's interests (Goldstein, 2008, pp. 167-8). The WTO's decision making structure is still problematic if it does not take seriously how power dynamics among rich and poor countries influence the fairness of agreements.

Trade liberalization (the removal of protectionist trade policies such as tariffs) has been a conditionality on poor country loans from the World Bank and IMF, and has also been a central feature of WTO agreements. Trade liberalization creates problems for infant industries in developing countries, as such liberalization places these industries in competition with more resourceful and well established foreign firms. Historical arguments have been offered that some form of protectionism is important in the early stages of economic development (Moellendorf, 2009, pp. 96-98). Despite the demands for trade liberalization pressed by rich countries, many still employ their own protectionist policies themselves in their industrial and agricultural sectors (Pogge, 2008, p. 17). These policies severely reduce potential export earnings for developing countries, since their goods cannot compete against the domestically subsidized industries of developed countries (Moellendorf, 2009, pp. 93-96).

A more specific problem involves the extraction of valuable minerals (oil, copper, tin, etc.) from developing countries for export to developed markets. A troubling phenomena known as the 'resource curse' has been documented in which resource exporting developing countries fare poorly in terms of poverty reduction. The 'resource curse' is perpetuated by importing country policy, as Lief Wenar explains:

The default policy of all importing states is to grant the legal right to sell natural resources to whoever can maintain coercive control over the territory where those resources are located (Wenar, 2011, p. 29)

Thomas Pogge calls this the 'International Resource Privilege' whereby the international economic community recognizes undemocratic governments as the owners of a nation's natural resource endowment (Pogge, 2008, pp. 112-113), capable of entering into contracts regarding the exploitation of these resources and reaping the benefits for a small ruling elite. This provides a strong incentive for groups within such countries to seize, maintain, and compete for power, and so contributes to the ills of domestic conflict within poor countries. As we will see in §3.2.2 this appropriation of mineral wealth amounts to a kind of theft perpetrated against the populace of poor countries, a theft which rich importing countries are complicit in. The problem here can be seen as a lack of institutional capacity: 'while there is an international market, there is no international system of property law' (Wenar, 2011, p. 29).

Even for those poor countries that have some degree of democratic governance and direct the benefits of mineral sales toward the public good, challenges remain in realizing the full value of their mineral wealth as the extractive companies that have been contracted to develop mineral assets in these countries have developed sophisticated methods of avoiding taxation:

Resource-rich countries in Africa are highly vulnerable to aggressive tax planning and tax evasion facilitated by the extensive use of offshore companies, the high levels of intra-company trade and the commercial secrecy surrounding foreign investment activity. African governments lack the human, financial and technical resources needed to secure tax compliance, and the commercial market intelligence needed to assess company tax liabilities. As a result they are losing significant revenue streams. (Kende-Robb & Watkins, 2013, p. 65)

It is estimated that capital outflow from tax evasion and other illicit capital flows in Sub-Saharan Africa exceed inflows from development assistance and foreign direct investment (Kende-Robb & Watkins, 2013, p. 65). To Wenar's comment on the lack of international

property law, we can add a lack of coherence and cooperation regarding international tax law.

While the problem with global financial and economic institutions like the World Bank, IMF, and WTO is that the existing rules or agreements seem unfair, the problem in the cases of international tax and property law is that a lack of institutional capacity leaves no opportunity for fair interactions in the first place.

In this chapter, I have offered a background of some of the more oft cited facts relevant to our moral relations with the global poor. To summarize, poverty is a significant burden on the wellbeing of those that survive it – but sadly, many do not. Citizens of rich countries have both the ability and opportunity to alleviate this suffering. Furthermore, global poverty is not a problem that can be wholly explained with reference to local factors of poor persons or poor countries. There are many types of relations and associations (financial, economic and otherwise) that rich countries have created and maintain with poor countries that play an important role in the perpetuation of global poverty. With this factual background in hand, we are prepared to undertake an investigation of the content of our obligations to the global poor.

3. Obligations to the Global Poor

3.1 Three Obligations to the Global Poor

What are our obligations of justice toward the global poor? In this section, I will approach this question by surveying a broad set of theories of the grounds and extent of our obligations of distributive justice. I will then argue for a common set of obligations among all of these views, and take these obligations as a minimal account of our duties to the global poor. These obligations are:

1. duties to ensure the fulfillment of the basic needs⁷ of the global poor
2. duties to ensure the attainment of an adequate level of wellbeing⁸ for the global poor
3. duties to reform⁹ global institutions

Many theorists have debated the exact content of our moral obligations to the global poor. This will not be my aim. An investigation of our moral failures to the global poor *need not* detail the exact content of our obligations of justice to them. What it need detail is a set of obligations that enjoy wide support from numerous moral and political views; a set of obligations that it is difficult for any morally reflective agent to deny. As long as it can be argued (as it is in §4) that we fail in *these* obligations, that is sufficient to ground the

⁷ For an excellent discussion of how to define basic needs, and measure their fulfillment, see (Brock, 2009, pp. 46-75)

⁸ Measures such as the UN Human Development Index discussed earlier are helpful measures of wellbeing, and could be used to define the threshold of 'adequacy'. Following Brock (2009, pp. 152-169) I also include the enjoyment of basic liberties as essential to wellbeing.

⁹ As will be seen, the varying theories considered differ in exactly the kind of reform of global institutions they would advocate. For example, egalitarians would desire global institutions that promote global equality, while libertarians would instead favor institutions that clearly define international property rights. Given these tensions, I will borrow Gillian Brock's conception of the justice of global institutions which states:

... The society of states/international community should make it possible for each country to have reasonable opportunities to achieve the kind and level of economic activity necessary to sustain the goals of global justice. (Brock, 2009, p. 230)

Where I will take the 'goals of global justice' to be the fulfillment of duties (1) and (2).

claim that we fail in (at least some of) our moral obligations to the global poor and so motivate an investigation of these failures.

As this chapter specifically (and the discussion that follows generally) is centrally concerned with the performance of our moral obligations, I will address three issues regarding my treatment of the concept of moral obligation.

First, I consider our obligations toward the global poor to be of a certain kind – obligations of justice. My central concern in framing our obligations to the global poor as obligations of justice is that we not leave the fulfillment of these obligations up to the uncoordinated action of morally well motivated individuals. Early discussion of our moral relations to the global poor framed them as an ethical quandary posed to the individual regarding how much they ought to donate to charity (Singer, 1972). This conception of our obligations fails to honor the essentially political nature of global poverty as a problem of creating and maintaining institutions of the right moral kind. I take our obligations of justice to be (i) those moral obligations that (ii) are related to the creation and maintenance of institutions, and that (iii) are best (or only) fulfilled through the coordinated and cooperative action of many agents, (iv) for which some degree of coercion regarding compliance is legitimate. One might object that our obligations of justice must concern (v) the basic structure of society (Rawls, 1999a, pp. 6-10). As it is debatable whether there is anything like a basic structure at the international level, those who declare it necessary to include (v) in the classification of obligations of justice will deny that we should describe our moral obligations to the global poor as obligations of justice. I will not comment on the necessity of (v), but rather state that if one grants that points (i) – (iv) above are true regarding our obligations to the global poor, then they share the core of my characterization of our obligations to the global poor. Any further disagreement regarding point (v) could easily be resolved if I refrain from terming these obligations of justice, which I would

happily do in their company. Nonetheless, when I use the term ‘obligations of justice’ in what follows, I do so with only (i)–(iv) in mind. Finally, I will not explore those moral relations that we have with the global poor that are not under the guise of ‘obligation’ – such as supererogatory acts. While I think such relations exist, they are not my focus.

Second, there is the question of who bears these obligations? When I say that *we* have obligations of justice, who does the ‘we’ refer to? When I use ‘we’ I am referring to citizens of affluent countries who have the ability and opportunity to fulfill these obligations. This is not to say that citizens of poor countries have no obligations of justice toward their fellow poor. There are issues of local governance in many poor countries that are essential to poverty reduction, and are especially (though not wholly) the responsibility of poor country citizens. Nonetheless, the intended audience of this work is my fellow citizens of affluent countries.

Third, there is the distinction between individual and group obligation and how this distinction bears on my project. It has been argued that the individual view of obligation is grossly underequipped to deal with modern moral problems (Lichtenberg, 2013, pp. 68-70). The argument presented usually highlights that modern moral problems are not caused independently by individual agents, but by the aggregate effects of many individual actions. Similarly, these problems cannot hope to be solved by the action of any individual agent, but only through collective action. Thus, our obligations regarding modern moral problems, like global poverty or climate change, must be group obligations. I believe that this argument rests on an uncharitable (and implausible) characterization of the notion of an individual obligation, where these obligations are usually taken to be of the form ‘*S* is obligated to *X*’ – where *S* is some agent, and *X* is some action, but restricted to those actions that *S* can perform *independently* of other agents. The lack of charity I mentioned comes in the restriction of the actions that we can be obligated to perform to only those that

we can execute individually or independently. These are obligations like ‘Jenn is obligated to return the book by 5pm’, or ‘Bob is obligated to mow the lawn’. A more generous view of the range of actions we can be obligated to undertake includes those actions that involve cooperation or coordination with *other agents*. Thus we can speak of individual obligations like ‘Sarah is obligated to cooperate with John to lift the beam off of George’¹⁰ where the action that Sarah is obligated to perform is a cooperative act involving other agents (i.e. John). We can expand the list of agents referred to in such obligations to include many persons, and I believe that this is a plausible way to speak of individual obligations regarding modern moral problems like global poverty. The standard form of individual obligation ‘*S* is obligated to *X*’ can therefore plausibly become ‘*S* is obligated to *cooperate with* $\{S_1, \dots, S_n\}$ to *X*’. When I speak of our ‘obligations’ in what follows, I have this sense of individual obligation in mind. This is not to say that I think it is implausible to frame our obligations to the global poor in terms of group obligations. I believe that the obligations I will detail could be recast in such terms, but in what follows I will pursue an individual conception of our obligations to the global poor.

3.2 Substantive, Universalistic Theories

The first group of views on distributive justice I will assess are both substantive and universalistic. They are substantive in that they purport to reveal our obligations directly, as opposed to deliberative theories (discussed later in §3.4) which only purport to reveal the requirements for a process of public deliberation which in turn yields these obligations. They are universalistic in that the obligations that they detail are not owed to some particular sub-group of persons, but are obligations that are owed to all human beings generally.

¹⁰ Allowing for this kind of obligation is especially plausible if neither Sarah nor John have the physical ability to individually lift the beam off of George.

3.2.1 Utilitarianism

According to utilitarian views of distributive justice, distributions should be carried out in such a way as to produce the best overall utility. Utilitarians vary in the kind of utility they focus on. Some favor a hedonic view, others favor a preference satisfaction view (Kymlicka, 2002, pp. 13-20). I will assess utilitarianism's support of duties (1)–(3) on both of these views.

On the hedonic view, the utility in question is the displeasure or pleasure agents experience from the states of affairs they find themselves in. Unfortunately, many of the global poor find themselves in states of displeasure due to their poverty. This displeasure can come in many forms. One might be suffering from the effects of a communicable disease and have no medical means of pain relief. For example, many Sub-Saharan Africans suffering from chronic diseases (such as cancer) cannot obtain morphine for pain relief, a drug readily available in rich countries (Silberner, 2012). One might suffer from the pains of hunger due to malnutrition. Psychological displeasure, such as feelings of worthlessness in not being able to provide for one's family, also results from conditions of poverty. Hedonic utilitarians would support redistribution¹¹ to the global poor if such redistribution improved overall hedonic utility. Assuming that this redistribution would be directed from the rich to the poor, the question is then whether the decrease in displeasure of the poor outweighs the decrease in pleasure of the rich.

One way to ensure that this utilitarian redistribution turns out favorably in terms of overall utility is to focus on redistribution funded by the richest of the rich directed toward the poorest of the poor. David Schweikart reports the following calculus carried out by

¹¹ I am assuming the utilitarian would take the utility producing resources to be redistributed as fixed. That is, the amount of resources taken away from some set of individuals would be equal to the amount of resources given to another set of individuals.

Peter Singer. Singer reviewed the UN Millennium Development Goals, a set of measureable goals aimed at the reduction of poverty set in 2000, aimed to be met by 2015.

Singer then looked at the cost estimate for meeting these goals, as calculated by the special U.N. task force headed by Jeffrey Sachs, charged with making such an estimate. The Commission came up with the figures—\$121bn in 2006 rising to \$189bn in 2015. He then did something quite interesting. He looked at the incomes of the top tenth of one percent of the U.S. taxpayers ... His conclusion is startling: if the top 0.01 percent (the top one hundredth of one percent) contributed a third of their annual income (leaving each household with an average \$8m to spend as they please) and the rest of the top one-tenth of one percent contributed a quarter (leaving them with an average of \$1.5m)—we would have \$126bn—\$5bn more than was needed in 2006. (Schweickart, 2008)

Two points solidify the claim that such redistribution would represent an overall increase in hedonic utility. First, there are many more poor persons (billions more) that would benefit from this redistribution than rich persons who would ‘suffer’ from the loss of their excess income. Second, these richest of the rich would still be left with over \$1m of expendable annual income. This amount is (I assume) enough to protect against most forms of displeasure and secure ample pleasurable experiences.

As the goods redistributed from such a scheme would be directed toward meeting the minimal requirements of physical and mental health of the global poor, hedonic utilitarians would support duties (1) and (2) above.¹²

On the preference satisfaction view, the utility in question is whether an agent’s desires are satisfied or frustrated. Regarding this view, it is plausible to think that the global poor are not indifferent to their poverty – they desire to fulfill their basic needs and attain an adequate level of wellbeing. Again, the question becomes whether redistribution from the

¹² To be sure, utilitarians of any kind do not endorse these duties directly, but only inasmuch as they are implied by the combination of the commitment to maximize overall utility, and the specific facts regarding the situation of the global poor in relation to the rich.

rich to the poor would represent an increase in overall (preference) utility. Following the line of reasoning presented previously, we can support a positive answer to this question given that many of the preferences of the richest of the rich will require much large quantities of resources to fulfill than the preferences of the global poor. Luxury purchases that would satisfy the preferences of only the few richest of the rich could be redirected to satisfy the much cheaper preferences of many poor persons to meet their basic needs and attain adequate wellbeing. Furthermore, research on the diminishing marginal utility of self-reported happiness levels relative to income also supports such redistribution. At low income levels, a given increase in income creates much greater increases in happiness levels than at high-income levels (Kymlicka, 2002, p. 40). Though self-reported happiness levels are not a direct measure of levels of preference satisfaction, I take them to be rough estimates of such. Thus it seems plausible to think that even modest levels of redistribution from rich to poor would create increases in overall preference satisfaction.

Finally, does utilitarianism support a duty to reform global institutions? For utilitarians, global institutions will be unjust to the extent that they fail to produce the best overall utility. Since the fulfillment of basic needs and attainment of adequate wellbeing are in part institutional problems, utilitarianism will support institutional reform in these areas. Beyond this, utilitarians should also support reform of global financial and economic institutions. In both of these contexts, there are relevant institutional alternatives that would produce better overall utility than the current institutional structure. Reforming financial institutions would remove the burden of odious debt from developing countries, allowing them to spend revenue on important public projects (health, education, governance) instead of interest payments. Reforming economic institutions would allow developing countries to capture unrealized export revenue, protect infant industries, and unlock the true value of their mineral wealth.

3.2.2 Libertarianism

The libertarian tradition in political philosophy stresses the importance of individual rights, and views these rights as demarcating the permissible limits of the coercive power of states. In terms of distributive justice, libertarians are especially focused on property rights: the moral claims that individuals have over physical resources and the duties (of others) that accompany these claims. Libertarians have a procedural view of distributive justice. Procedural views claim that the justice of a distribution turns on whether it accords with a set of just principles. As long as each individual's holdings can be backed up with appeal to these principles, the overall distribution is just, otherwise not. Most libertarians accept three such principles 1) principles of initial acquisition of resources, 2) principles of just transference of resources, and 3) principles of just redress or redistribution of resources (Nozick, 1974, pp. 151-2). As such, libertarians will support duties to the global poor if there has been a procedural non-compliance within the distributive system. That is, instances of unjust initial acquisition, unjust transference, or unjust redress within our shared distributive history with the poor will ground duties toward them.

I will distinguish between two broad types of libertarian thought: *Right-Libertarianism* and *Left-Libertarianism*.¹³ These types of libertarianism differ primarily in their views regarding the first of the three procedural rules of distribution mentioned above: initial acquisition of resources. They disagree about the initial ownership status of resources. The initial ownership status of resources is the question of what, if any, are the moral claims that individuals have over resources (land, minerals, etc.) before any individual choices are made. *Right-Libertarianism* claims that nobody has any initial claims over resources (Nozick, 1974, pp. 150,178). *Left-Libertarianism*, in contrast, claims that everyone has

¹³ For more on this distinction see (Vallentyne, 2012).

equal initial claims over resources. This difference of view on the initial ownership status of resources leads to differences in each type of libertarianism's view regarding our obligations of distributive justice to the global poor.

First, consider Right-Libertarianism. The fact of inequality itself matters little to the Right-Libertarian. Since all resources were initially unowned, it is conceptually possible that extreme global inequality has resulted from a valid procedural history in which the rich simply appropriated more resources first.¹⁴ But is this plausible? Colin Macleod argues that given even a modest understanding of history, it is not. Rather, obvious historical injustices motivate duties of compensatory justice toward the global poor.

... [T]he rich libertarian also knows the current distribution of resources has been significantly affected by a long history of force, fraud and theft. ... For instance he knows that colonialism and the establishment of slavery were gross violations of libertarian property rights and he also knows that these, and countless other instances of historical injustice, cast a dark shadow over the moral acceptability, from the point of view of [procedural justice], of current holdings. (Macleod, 2012, pp. 77-78)

In the contemporary setting, many Right-Libertarians might well identify the workings of global financial and economic institutions as amounting to instances of force, coercion and fraud. Consider the exploitation of a poor country's mineral wealth via the collusion of undemocratic domestic governments with global economic institutions:

The less citizens can control decisions over natural resources, the less legitimate those decisions are. At the limit, the property rights of a people are violated ... when some actor gains control of their assets by force, threat,

¹⁴ Often Right-Libertarians endorse a 'proviso' on the initial appropriation of unowned resources. Such a proviso might state that the appropriator must leave 'as much and good enough' for all others (Locke, 2004, pp. 22, Section 27), or that appropriation must not leave anyone worse off than if no such appropriation occurred (Nozick, 1974, p. 178). If such provisos are endorsed by the Right-Libertarian, the case for obligations to the global poor is made much easier, as arguably these provisos have not been observed. In what follows, I consider a Right-Libertarian view that endorses no such proviso.

or extreme manipulation. Where the people lack any power to stop the sale of their assets, the sale of those assets is illegitimate. (Wenar, 2011, p. 31)

Right–Libertarians would support global institutional reform in that it aims to remove the flawed procedures through which financial and economic interactions with the global poor amount to instances of force, coercion, fraud, and theft.

Right–Libertarianism is often taken to be the principal opponent to the view that we have obligations of distributive justice toward the global poor. This is because libertarianism (in general) is said to be hostile to what have been called ‘positive duties’. Libertarianism is said to only endorse negative duties, which are roughly duties of non–interference. On this interpretation of the libertarian tradition, my libertarian property right over my stapler means that you have a negative duty not to interfere with my use of it, but you have no positive duty to *aid* in my use of it. Even if this characterization of libertarianism is sound¹⁵, it does not commit the Right–Libertarian to the view that we have no obligations of justice to the global poor. Right–Libertarians must support duties of compensatory justice for procedural non–compliance (failure to fulfill our negative duties) in our historical and contemporary relations with the global poor.

Often Right–Libertarianism’s alleged hostility regarding obligations of justice to the global poor is extended to libertarianism in general. But as we will see, many libertarians of the left leaning kind endorse substantive duties to the global poor. Rather than pointing out instances of force, coercion or fraud in the transference of resources, Left–Libertarianism is able to more directly criticize global inequality as a manifestation of rights infringements on the equal initial claims we have over global resources.

¹⁵ See my discussion of Shue’s view below (page 29) for a criticism of the claim that libertarians should only endorse negative rights.

As I mentioned earlier, Left–Libertarianism differs from Right in that it maintains that individuals have equal claims over resources prior to any initial acquisition of those resources. The argument behind this view goes roughly as follows. Resources are crucial for the continued survival and wellbeing of individuals, so we intuitively have some claim over them, rather than none. Furthermore, when we focus on the *initial* ownership status of resources, we can see that there is no basis available to differentiate between claims (as no choices have been made), and therefore we have equal (non–zero) claims over resources (Risse, 2008, p. 285).¹⁶ But how do these initial claims become functional rights, which are the focus of libertarian political thought?

Some Left–Libertarians have endorsed a set of rights to an equal portion of the value of global resources (Steiner, 1994, pp. 235-236). Such a set of rights would motivate redistribution to the global poor (duties [1] and [2] above) and institutional reform (duty [3]), since such rights have not been respected historically, or contemporarily, as evidenced by the persistence of extreme global inequality¹⁷. There is no historical evidence of any such equal distribution of resources. Furthermore, each new person born into the world is, according to this Left–Libertarian view, due their equal share of the value of the earth’s resources. This Left–Libertarian right to an equal portion of the value of the earth’s resources is clearly being violated, children being the poorest of the global poor. Notice that the Left–Libertarian need not appeal to the violent history of colonialism or slavery to motivate duties to the global poor. It is enough that contemporary global inequality is a manifestation of a failure to respect the global poor’s initial equal claims over global resources.

¹⁶ Right-Libertarianism also endorses equal claims over resources; equal in the sense that everyone has *no* claims over resources.

¹⁷ It is implausible to think that the current extreme inequality of global distributions could have resulted from a history that accorded with Left-Libertarian rights, given that the starting point stipulated by those rights is equality of resources.

I will close this section by considering an objection to my account of libertarianism's support for duties of justice toward the global poor. As mentioned earlier, libertarianism is often alleged to only endorse negative duties. But obligations (1)–(3) outlined above are not merely negative. In order to fulfill these obligations, it is not enough that we refrain from certain forms of interference in the activities of the global poor. Rather, we need to create and maintain institutions that ensure the global poor meet their basic needs and attain adequate wellbeing, and we need to reform institutions that perpetuate poverty. Often such obligations to create, maintain, and reform institutions are positive duties. So, the claim that libertarianism only endorses negative duties creates tension with obligations (1)–(3). To resolve this tension, I will argue that it is plausible to conceive of our libertarian obligations of justice as giving rise to positive duties. Here, Henry Shue's discussion of the basic right to security is insightful. No society treats the basic right to security (often claimed to be the prime example of a negative right) as one whose fulfillment can be expected under circumstances in which each individual simply observes a duty of non-interference to every other. Rather, individuals cooperate and coordinate to create institutions that deliver a social guarantee of security. Police forces serve to meet the needs of domestic security, while national military forces protect international security. In order to facilitate the creation and maintenance of these basic institutions, citizens are required to provide collective financial support for them through taxes. Thus, the basic right to security is not correlated with a negative duty on the part of other individuals not to interfere with my personal security. Rather, it is correlated with a positive duty on the part of all members of my society to create and maintain a basic set of institutions that deliver a social guarantee of security to everyone. As Shue says:

the central core of the right [to security] is a right that others not act in certain ways. But the mere core of the right indicates little about the social

institutions required to secure it, and the core of the right does not contain its whole structure. The protection of 'negative rights' requires positive measures ... (Shue, 1996, p. 39)

This same thinking applies to what Shue calls 'subsistence rights': rights to those resources required to meet basic needs. Once again, practical considerations dictate that the best strategy to secure such a right involves large scale cooperation across a society to provide a social guarantee that sufficient basic resources will be distributed to individuals under threat of deprivation.

In conclusion, the claim that libertarianism endorses only negative rights goes beyond what I take as libertarianism's two fundamental distributive concepts: (1) *proceduralism* as a mode of distributive justification, and (2) *rights* (simpliciter) as the primary type of normative factor to be reconciled in our distributions. We saw two arguments for the view that libertarianism endorses obligations of justice to the global poor that can be viewed as stemming from each of these concepts. On the one hand, the proceduralism that is characteristic of the libertarian view gives rise to Right-Libertarian duties of compensatory justice for historical and contemporary acts of procedural non-compliance involving the global poor. The focus on rights, on the other hand, supports Left-Libertarian duties of justice to the global poor as a way of respecting their claim rights over globally shared resources.

3.2.3 Egalitarianism

Egalitarians place emphasis on the political value of the equality of distributions. Egalitarians differ on what they take the appropriate 'currency' of egalitarian justice to be. Should we equalize resources (Dworkin, 2000, pp. 11-119), capabilities (Sen, 2009, pp. 231-235), or primary goods (Rawls, 1999a, pp. 54-55)? They also differ on the grounds of the value of equality. Is equality a good in and of itself (intrinsic value), or only a means to

some other valuable end (instrumental value)? This diversity of thought does not, however, complicate egalitarianism's support for the three duties of justice detailed in §3.1.

Regarding the diversity of thought on the currency of justice, since there is considerable inequality between the global rich and global poor on *any* one of these currencies, global inequality is an injustice for any egalitarian. Regarding the diversity of thought on the value of equality, a similar point can be made. Whether egalitarians endorse an instrumental account of the value of equality, or some intrinsic account, obligations of egalitarian justice toward the global poor do not change substantially. What matters is that there is global inequality and there ought not be. What exactly the reasons are that justify the latter normative claim is not relevant to my project.

The many egalitarian views of justice support the three duties I outlined at the start of this section because they are essential steps toward reducing extreme global inequality. In fact, egalitarians often support further duties beyond those detailed in §3.1. Inequality could still be considerable even after these duties are met and so egalitarians would support further redistribution to reduce this inequality (Caney, 2001). In this way, egalitarianism includes – but goes beyond – the three duties I outlined at the beginning of this chapter. These are best viewed as *sufficientarian* as they aim to establish a sufficient level of needs fulfillment and wellbeing for the global poor, along with minimal fairness in the international institutions that facilitate our interactions with them.

3.3 Substantive, Associative Theories

The second group of theories of distributive justice I will explore are substantive, but *associativist*. Associativist theories claim that obligations of distributive justice only obtain among individuals who share some form of association beyond 'being human'. My

discussion of the associativist views will be structured around what exactly this form of association is taken to be.

3.3.1 Coercion Theory

One account of the association that matters for distributive justice is self-imposed susceptibility to a shared coercive political order. Writers like Thomas Nagel take the fact that citizens of modern democratic nation states are, by their own choice, subject to laws that impose coercive threats on them (e.g. pay your taxes or go to jail) to identify the association that gives rise to substantive duties of distributive justice.

I submit that it is this complex fact—that we are both putative joint authors of the coercively imposed system, and subject to its norms, i.e., expected to accept their authority even when the collective decision diverges from our personal preferences—that creates the special presumption against arbitrary inequalities in our treatment by the system. (Nagel, 2005, pp. 128-129)

Before I assess the support offered by this view to duties (1)–(3), let me be clear about what it does *not* say. Most coercion associativists still admit that citizens of affluent countries have obligations of humanitarian aid¹⁸ to those suffering from the effects of poverty. For them, this is a moral matter related simply to the severity of the deprivation and our ability to aid.

Whatever view one takes of the applicability or inapplicability of standards of justice to such a situation, [global poverty] is clearly a disaster from a more broadly humanitarian point of view. I assume there is some minimal concern we owe to fellow human beings threatened with starvation or severe malnutrition and early death from easily preventable diseases, as all these people in dire poverty are. (Nagel, 2005, p. 118)

¹⁸ As I mentioned in §3.1, this is an instance where the coercion theorists would likely take issue with these obligations being termed obligations of *justice*. Again, as long as the coercion theorists admits points (i)-(iv) in §3.1, I take this as sufficient to support duty (1).

In this way, coercion associativists accept the first of the three duties: duties to ensure the attainment of the basic needs of the global poor. The focus seems to be on whether there are substantive egalitarian duties toward the global poor. But as we saw in the previous section, egalitarianism likely proposes the most robust set of duties among all substantive theories. Opposing this robust set of duties does not imply the denial of the minimal, sufficientarian set of duties I aim to establish broad support for.

But coercion associativists might still have problems with the second and third of the duties I have outlined. Duties to ensure the attainment of an adequate level of wellbeing for the global poor, and duties to reform global institutions might be seen as going beyond our humanitarian obligations. Is such opposition plausible? I do not think it is.

As Nicole Hassoun has argued, the assumption that there is no coercive international institutional structure is mistaken. Nagel says the following regarding the global institutional structure:

Current international rules and institutions ... lack something that according to the political conception is crucial for the application and implementation of standards of justice: They are not collectively enacted and coercively imposed in the name of all the individuals whose lives they affect; and they do not ask for the kind of authorization by individuals that carries with it a responsibility to treat all those individuals in some sense equally (Nagel, 2005, p. 138)

Although the global institutional structure differs greatly from most domestic coercive structures, it is nonetheless coercive. Nicole Hassoun presents evidence of the coercive nature of global institutions like the UN, WTO, IMF, and World Bank. She also comments on bi-lateral coercion, where powerful states like the US use their position to dominate other, weaker states (Hassoun, 2012, pp. 68-87). Similarly, Richard Miller argues that the coercive force of individual states extends beyond their borders given that many restrict

immigration, and claim sovereignty over the natural resources within their borders. Outsiders are threatened with coercion if they attempt to breach borders and utilize resources therein (Miller, 2008, p. 516).

The coercion theorist might reply that, unlike the case of modern democracies, this coercive structure is not self-imposed, or consented, by those it affects. But this is not enough to avoid the issue. It seems that the coercion associativist must recommend we do one of two things regarding this non-consensual coercive global structure. On the one hand, they could recommend that we make this coercive global structure consensual. But given the democratic deficit in many of these institutions (Krishnamurthy, 2014, pp. 9-15), this amounts to an endorsement of (3) – duties of institutional reform. Furthermore, if we were successful in transforming the coercive global institutional structure into one that is consensual, then by the associativists own principle, we would have obligations of justice to the members of this global institutional structure (like duty [2] above), since this coercive structure is self-imposed. On the other hand, the coercion associativist could recommend that we cease the coercion of the global institutional structure, as it is not consensual (as it ought to be). Again, this is an endorsement of (3) – duties of institutional. Here, the obligations in question would be to dismantle, and afterward refrain from creating coercive international institutions since obstacles remain to such institutional structures being consensual (as they ought to be).¹⁹ Furthermore, it is arguably the case that the global poor are due some form of compensation for the past history of non-consensual coercion under the global institutional structure, especially if that structure was to the benefit of the global rich. Such compensation could be directed toward the attainment of an adequate level of wellbeing for the global poor, creating support for duty (2) above.

¹⁹ Note that this is very different from the claim that there are no obligations regarding international institutions because those institutions are not coercive. Here, there is clearly an obligation: refrain from creating and maintaining coercive international institutions.

3.3.2 National Partiality

Some associativists are less interested in detailing the sufficient or necessary conditions for obligations of justice and more interested in exploring how we can be justified in being partial toward some of our obligations. National partiality is the view that we are justified in being partial toward our obligations of justice to our co-nationals over our obligations to extra-nationals. Richard Miller argues that while living under the self-imposed coercive rules of institutions gives some reason to be partial to our co-nationals, it does not capture the entirety of our common moral thinking about national partiality. What we need in addition is the “proper valuing of joint loyalty on which a life determining collective project depends” (Miller, 2008, p. 513). We are currently engaged in such joint-projects: living together in nation states as Canadians, Americans, Britons, etc. In these political projects, our partiality to fellow participants (co-nationals) is justified based on the special concern for fellow participants that such projects demand. These projects demand such loyalty because their success depends critically on it (Miller, 2008, p. 513). Political projects are ambitious and involve many participants who must cooperate to meet these ambitious goals. A sense of trust among these participants is crucial to effective cooperation, and loyalty to the joint-project solidifies this trust. Political projects are also long-term, and so require a considerable time-commitment from participants. Loyalty is a kind of valuation that includes the longevity of commitment need for these long-term projects.

For my purposes, this account gives rise to a worry regarding the duties I seek to establish broad support for: does endorsing such a justification of national partiality lead to the crowding out of duties to distant others? If our political projects demand most of our time and resources, is there anything left to address the problems of global poverty?

Miller explains that the ‘strength’ of national partiality relative to our other moral obligations turns on three criteria regarding the joint-project: “[1] the importance of the

project to all concerned, [2] how potentially demanding the required institutional loyalties are, [3] how effective the cooperative project is as a means to helping the needy.” (Miller, 2008, p. 514). Since most of our political projects are important, demanding, and an effective means of serving our needy compatriots, the strength of national partiality is considerable.

Nonetheless, Miller maintains that we also have weighty obligations to the global poor. He argues that we have an interest in insuring that the proper valuing of loyalty to joint-projects is not merely a national, but also an international norm.

... a morally responsible citizen of a rich country will want the reliability of international norms to depend on loyal self-respectful support in rich and poor countries. Extrapolating domestic reasoning, she will, then, want our norm governed international system to become one in which concern for others throughout the world responds to such freely given loyalty ... foreign aid is a first step in the construction of such a system (Miller, 2008, p. 517)

This interest in fostering the international norm of joint-project loyalty could take multiple forms. Citizens might be interested in this norm because they realize that the success of their domestic joint-project (their nation) is influenced by a broader international system. Acknowledging the reality of globalization leads them to value international norms of joint-project loyalty as a means of fulfilling their domestic joint-project goals. Alternatively, citizens might include within the goals of their nation a willingness to be a leading, trustworthy, or exemplary international partner (as many do). This provides a direct valuation of the standing of their political project in relation to the global poor. Both of these forms of fostering the international norm of loyalty to joint-projects supports obligations (1) and (2) outlined above in the form of foreign aid.

Finally, Miller also argues that we have obligations of justice to the global poor due to the forces of dominance and exploitation that rich countries exert over poor countries.

If I benefit from others' agreeing to work on terms incompatible with a good life because their bargaining position is weak, then a proper valuing of willing cooperation requires a special disposition on my part to use my gains to help relieve their disadvantages ... These days, affluent people in the per-capita richest countries are apt to derive considerable material benefits from such bargaining disadvantages of poor foreigners. They gain from the consequent cheapness of labour and raw materials, while their own special skills or financial assets shield them from costs that globalization can impose on their less affluent compatriots. (Miller, 2008, p. 527)

Miller claims that the appropriate route to help relieve the disadvantages of the global poor is to, once again, provide foreign aid. But if globalization harms the poor, it also seems plausible to support global institutional reform that aims to put an end to the domination and exploitation of the global institutional structure (i.e. duty [3] above). If I benefit from an exploitive relation, it seems implausible that my obligation is merely to redirect some of this benefit to the exploited party. Rather, my obligations are also to undertake actions to cease this inequitable relation with the previously exploited party. In this way, Miller should also support the third obligation outlined above – duties to reform global institutions.

3.4 Deliberative Theories

So far, we have surveyed a wide range of substantive views on the content and scope of our obligations of distributive justice. Each of these theories claims numerous adherents, both in the ranks of academic philosophy and in the general public. Thus, there is considerable disagreement regarding how to best answer questions of distributive justice, philosophically and publicly. How do we proceed given this disagreement? On one view, we should do more philosophical work in order to reveal the *truth* about distributive justice; the task is to get rid of disagreement by refining our theories and the arguments that

support them until one emerges as the clear answer. Another view, the focus of this section, provides a different answer to the question of how to proceed in light of considerable disagreement regarding political questions. That is the view that we ought to devise a method of forming answers to political questions *given* that we disagree about them. This approach has come to be known as *public reason*.

Through the operation of a well formed process of public deliberation, public reason tasks citizens with forming agreements regarding political questions based on shared or similar reasons. Despite the fact that citizens disagree regarding the soundness of the arguments for their specific views, they might still reach agreements based on shared or similar reasons common among their positions. Public reason aims to exploit this common body of reasons to allow societies with diverse philosophical, moral and religious views to answer political questions and form a common conception of political legitimacy. The task for theorists of public reason is to properly detail the process of public deliberation by which citizens with such diverse views can form agreements on political questions. I call the proper detailing of such a process of public reason a 'conception of public reason', of which there are many.

Does public reason lend support to the three duties of justice I argue enjoy broad support? This question is confronted by an immediate worry: generally, theories of public reason cannot determinately proclaim what the *full* set of our obligations of justice are until the actual process of public reason has been undertaken. Again, these are deliberative theories; deliberation is required to detail the content of our obligations. But often public reason theorists do endorse some *minimal* set of duties, namely those required for the well-formed process of public reason itself to operate, and those that are taken to immediately follow from these duties. To show how public reason supports the three duties I argue enjoy broad support, I will investigate two conceptions of public reason, one offered by John

Rawls and another by Amartya Sen. I will argue that among the minimal set of duties detailed by these theorists, we find obligations of justice to the global poor.

3.4.1 Rawls's 'Law of Peoples'

Most students of political philosophy are familiar with John Rawls's work *A Theory of Justice* where he presents a liberal egalitarian theory of justice ('justice as fairness') inspired by the contractarian tradition. Later in his career, Rawls set out to remedy what he took to be a serious problem for 'justice as fairness': the reality of reasonable pluralism (Rawls, 1993, p. xvii). The society imagined as adopting 'justice as fairness' in *A Theory of Justice* was one that was relatively homogeneous from a philosophical, moral, religious, and cultural perspective. But this assumption does not carry over to modern democratic societies, which are characterized by great diversity in philosophical, moral, religious, and cultural thoughts and traditions. Thus, in *Political Liberalism* Rawls lays the groundwork for a 'public political conception of justice' to succeed 'justice as fairness'. This public political conception of justice is the product of a process of public reason in which reasonable citizens reach agreements on constitutional essentials and matters of basic justice by identifying reasons common among their diverse philosophical, religious, or cultural background (which are termed 'comprehensive doctrines'). The result is a liberalism that, unlike the liberalisms of old, (Kantian, Millian, and 'justice as fairness') does not demand that any citizen accept one of the many contentious comprehensive doctrines in order to endorse a public conception of justice.

In a subsequent book titled *The Law of Peoples*, Rawls extends his conception of public reason into the international realm. He proposes two tiers of public reason (Rawls, 1999b, p. 55). First, at the domestic level, Peoples (Rawls's term for societies) of liberal states will develop a public political conception of justice as outlined in *Political Liberalism*. Other societies, however, will not be liberal. They may reject democracy, or restrict the rights and

liberties of certain groups. Consultation hierarchies, where political decisions are made by some ruling group in consultation with the general populace, are an example of non-liberal societies. Nonetheless, these societies might still respect human rights, and grant a wide range of civil liberties. As such, Rawls terms them ‘decent’ societies. Together with liberal societies, decent societies are called well-ordered societies. At the international level, a second tier of public reason yields the rules by which these well-ordered societies interact as free and equal – a *Law of Peoples* (Rawls, 1999b, p. 37). Rawls provides a sample of such rules that are ‘familiar and traditional principles of justice among free and democratic people’ including:

1. Peoples are free and independent, and their freedom and independence are to be respected by other peoples. ...
4. Peoples are to honor human rights. ...
8. Peoples have a duty to assist other peoples living under unfavorable conditions that prevent their having a just or decent political and social regime.

Important for my purposes is Rawls’s discussion of (8) above – the ‘duty of assistance’ (Rawls, 1999b, pp. 105-112). As a part of *The Law of Peoples*, this duty is owed to ‘burdened societies’ by well-ordered societies. Burdened societies, according to Rawls, “lack the political and cultural conditions, the human capital and know-how, and often, the material and technological resources needed to be well-ordered” (Rawls, 1999b, p. 106). Burdened societies²⁰ are owed assistance from well-ordered societies in order to overcome the obstacles they face to becoming well-ordered. This duty is justified if we think of the *Law of Peoples* as derived from a second original position, in which representatives of Peoples are placed behind a veil of ignorance that deprives them of knowledge of their

²⁰ I take Rawls’s category of ‘burdened societies’ to be roughly equivalent to my term ‘poor countries’.

societal membership. These participants, as rational, will agree to the duty of assistance to guard against the chance that they turn out to be citizens of a burdened society.

Alternatively, this duty is justified by analogy to the case of domestic public reason in a liberal society. Rawls explains that reasonable liberal conceptions of justice endorse three principles:

The first enumerates basic rights and liberties of the familiar kind from a constitutional regime

The second assigns these rights, liberties and opportunities a special priority, especially with respect to the claims of the general good and perfectionist values; and

The third assures for all citizens the requisite kinds of primary goods to enable them to make intelligent and effective use of their freedoms (Rawls, 1999b, p. 14)

Rawls explains that this third principle expresses the idea that ‘public reason contains a form of public political deliberation’ (Rawls, 1999b, p. 51) and that certain provisions are required to ensure citizens can effectively engage in this deliberation as free and equal. The ‘duty of assistance’ can then be viewed as the extension of this principle to the second (international) tier of public reason. In order for burdened societies to effectively participate in the process of global public reason at all, they need assistance. The assistance is used – at minimum – to create institutions that secure basic human rights. After this goal is met, burdened societies might choose to develop a suitable consultation hierarchy, or perhaps liberal democratic institutions. After such well-ordered institutions have been established and the prospect for their stability is positive, burdened societies have the capacity to participate in the Society of Peoples as free and equal. The duty of assistance is then met, and no further aid is required.

Rawls's 'duty of assistance' provides clear support for duties (1) and (2) outlined above. Access to the means to meet one's basic needs is often identified as a basic human right²¹, and so would be supported by the duty of assistance. Basic institutions can help provide important elements of individual wellbeing, such as education, political participation, and secure means of social interaction. As for duties of institutional reform (3), Rawls's 'duty of assistance' also supports this duty since many of the institutional reforms that are needed are matters of basic fairness in financial and economic relations between rich and poor countries. Currently, interest payments on odious debt and lost tax revenue burden poor societies and hinder their ability to create and maintain basic well-ordered institutions. Rather than assisting burdened societies, the global institutional structure in many cases burdens them further. In this way, duties of institutional form are a required step toward properly fulfilling Rawls's 'duty of assistance'.

3.4.2 Sen's Global Public Reason

While Rawls took a two-tier approach to global public reason, other authors have opted to question the assumption that matters of justice must *first* be decided at the domestic level, before questions of international justice can be addressed. Amartya Sen argues that global considerations are not an afterthought for a conception of public reason:

There are two principal grounds for requiring that the encounter of public reasoning about justice should go beyond the boundaries of a state or region, and these are based respectively on the relevance of other people's *interests* for the sake of avoiding bias and being fair to others, and on the pertinence of other people's *perspectives* to broaden our own investigation of relevant principles, for the sake of avoiding under-scrutinized parochialism of values and presumptions in the local community (Sen, 2009, p. 402)

²¹ As in the United Nations Universal Declaration of Human Rights, Article 25 (United Nations, 2014).

Sen's view differs from Rawls's in the requirement that thinking about justice 'go beyond the boundaries of a state or region'. For Rawls it is true that individual citizens reasoning publicly about questions of justice in the domestic context might have comprehensive doctrines that include an interest in people outside their borders. But this possibility is just that: a possibility, not a requirement. In contrast, Sen thinks that such broadening of our reasoning is a requirement of a well-formed process of public deliberation about justice. He explains that this requirement is inspired by Scanlon:

There is also an inclusional broadening in the Scanlonian [contractarian] approach since the persons whose interests are affected need not all come from only one given society or nation or polity, as in the Rawlsian 'people by people' pursuit of justice. Scanlon's formulation allows broadening of the collectivity of people whose interests are seen as relevant: they need not all be citizens of a particular sovereign state, as in the Rawlsian model. (Sen, 2009, p. 199)

The decisions that we make domestically can, in many cases, affect the interests of people outside our borders. Most obvious are restrictions on immigration or travel across those borders, but other policies that affect distant others include our trade and environmental policies. Sen's point is that a clear cut distinction between domestic and international issues may well be dubious. Rawls seems to endorse such a distinction, thinking that we can treat individual societies like isolated units where 'domestic' policy does not extend beyond borders.

But the fact that domestic policy can affect the interests of distant others is only one reason to think a broadening of our public reasoning is required. Another regards the wealth of views on the concept of justice that can be gathered from such a broadening. Sen explains that searching for a variety of perspectives from far as well as near helps ensure that we have, in our public reasoning, surveyed as many of the relevant factors that bear on

our political judgments (Sen, 2009, pp. 403-407). In the domestic setting, we might only be familiar with a small set of the variety of impartial forms of reasoning that can shed light on the concept of justice. Our many disagreements about justice reveal that there are multiple distinct perspectives that all reveal a ‘piece of justice’.²² The point of public reason is to develop an answer to political questions that properly integrates this diversity of moral reasoning. Thus, it is a requirement of a well-formed process of public reason that participants make an active effort to broaden their perspectives on justice beyond those that are readily available at the domestic level. Far from being a problematic source of international tension, the diversity of substantive views on justice (if properly respected) is thus a critical component to the success of public reason.

The most direct method of integrating the interests and perspectives of distant others into the process of public reasoning would be to include them, directly, in the process of public reason. This would amount to the removal of the domestic – international distinction in public reason, and would promote one public forum in which political questions are addressed – a kind of global democracy. But Sen does not endorse the view that global government is necessary for global public reason (2009, p. 408). Rather, he argues that the most plausible way to broaden our public reasoning is to task domestic reasoners to seek out distant perspectives and include them in their public reasoning. Instead of global democracy, we would do well with global citizens. Another route is to strive for the ideal of global democracy in the many global institutions that we already have. As discussed earlier, many of these institutions are arguably undemocratic (Krishnamurthy, 2014, pp. 9-15), and so Sen’s recommendation here lends direct support to duty (3) above. As for duties (1) and (2), it is plausible to think that these duties would be a product of a process of public reason that properly integrates the interests and

²² Sen calls this phenomena a ‘plurality of impartial reasons’ (Sen, 2009, p. 194)

perspectives of the global poor, as Sen says public reason should. The global poor have an interest in meeting their basic needs, and attaining an adequate level of wellbeing. Their perspectives on issues of justice that we integrate into our public reasoning would likely highlight and stress concerns regarding domination, exploitation, and vulnerability as important impartial reasons to include in a conception of justice.

The purpose of this chapter was to survey a broad range of theories on the content and scope of our obligations of justice to the global poor. As shown above, these diverse theories all endorse a minimal set of obligations to the global poor. I will hereafter take it as plausible to state that we have such obligations. Of course, other theories (or perhaps more nuanced versions of the theories I have explored above) might deny these obligations. I assume, however, that such theories will be in the minority of those held by moral and political philosophers. My primary aim is not to convince everyone that we have these obligations, but rather to convince the reader that it is plausible to think, on a broad range of moral theories, that we have them. That some few theorists deny this should not de-rail my project.

4. Failing the Poor

Given that it is plausible to think that we have a minimal set of obligations to the global poor, we can now ask, are we fulfilling these obligations? In this chapter I will argue that the answer, sadly, is no. Let me qualify this claim with reference to my view of obligation introduced in §3.1. To reiterate, I take our moral obligations to the poor to be individual obligations to cooperate with other persons to fulfill duties (1)–(3) detailed in §3.1. When I say that we fail in these obligations, I do not mean to say that each and every one of us fails to cooperate with other persons to fulfill our duties to the global poor. I do, however, think that there is a sufficient level of individual failure to amount to inadequate performance of the cooperative action. That is, enough of us fail in our cooperative obligations such that basic needs are not met, adequate wellbeing is not attained, and global institutions continue to perpetuate poverty.

4.1 We fail in our obligations to ensure the fulfillment of the basic needs of the global poor

Despite the fact that progress has been made in important areas such as access to clean water²³ and hunger relief²⁴, many of the global poor still struggle to meet their basic needs. The UN reports that '[g]lobally, about 870 million people are estimated to be undernourished', '2.5 billion in developing countries still lack access to improved sanitation facilities' and '[i]n 2011, 768 million people remained without access to an improved source of drinking water.' (United Nations, 2013a). As mentioned in §2.1, this deprivation means that many of the global poor do not survive the burden of poverty. The death of 18 million

²³ Regarding UN Millennium Development Goal Target 7.C the UN says "The world has met the target of halving the proportion of people without access to improved sources of water, five years ahead of schedule." (United Nations, 2013a)

²⁴ Regarding UN Millennium Development Goal Target 1.C: Halve, between 1990 and 2015, the proportion of people who suffer from hunger – the UN says "The hunger reduction target is within reach by 2015." (United Nations, 2013a)

poor persons per year – many of them young mothers and children – is a strong indication of our failure regarding this obligation.

4.2 We fail in our obligations to ensure the attainment of an adequate level of well-being for the global poor

In 2000, the UN endorsed a set of goals aimed at measurably combating global poverty. Called the Millennium Development Goals, one of the early successes among the many goals was:

Target 1.A: Halve, between 1990 and 2015, the proportion of people whose income is less than \$1.25 a day

Commenting on the performance regarding this target, the UN says:

The global poverty rate at \$1.25 a day fell in 2010 to less than half the 1990 rate. 700 million fewer people lived in conditions of extreme poverty in 2010 than in 1990. However, at the global level 1.2 billion people are still living in extreme poverty. (United Nations, 2013a)

To this last note we can also add the fact that the majority of the 700 million persons who escaped extreme poverty since 1990 were from the regions of South Asia, and East Asia and the Pacific. Extreme poverty has not seen considerable reduction in other regions, such as Sub-Saharan Africa (See Figure 4–1: Percentage of Population Living on Less Than \$1.25/day).

I do not mean to understate the importance of this accomplishment. That 700 million people are less vulnerable to the threats that extreme poverty poses is a good thing. But we ought not to take these statistics as an indication that we are fulfilling our obligations to the global poor – much that could have been done to combat poverty since 1990 has not. As discussed earlier, most rich nations have not increased the funds they contribute in Official Development Assistance to poor countries to meet the 0.7% GNI target. Furthermore, few

of these aid dollars go to the least developed countries, and of those dollars, many are ineffectively spent (see §2.2).

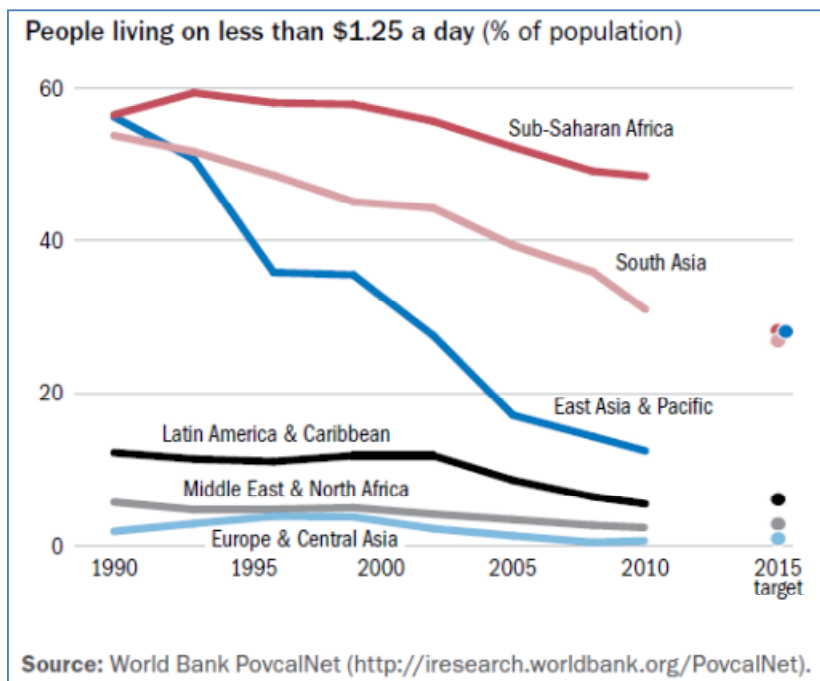


Figure 4–1: Percentage of Population Living on Less Than \$1.25/day (The World Bank, 2014)

4.3 We fail in our obligations to reform global institutions

Global institutions have transformed dramatically over the past 100 years. These institutions have both contributed to globalization, but also been formed by it. In §2.3 and §2.4 I explained how many claim that international financial and economic institutions engage in relations with poor countries that are arguably exploitative and unjust. But it is also true that these institutions have undertaken their own reforms in light of these criticisms.

The IMF and World Bank began, in 1996, the Heavily Indebted Poor Countries Initiative (International Monetary Fund, 2014), which aims to relieve the debt burdens of the most indebted, least developed countries. This initiative has succeeded in relieving the burden of interest and principal payments on some multilateral and bilateral debt from beneficiary

countries. But large amounts of private debt still remain a burden for poor countries (Ndikumana & Boyce, 2011, p. 33). Furthermore, the IMF and World Bank have not addressed deeper issues regarding who these institutions view as legitimate signatories for loans, nor have they addressed the democratic deficit within their decision making structure.

The WTO has taken steps to accommodate the surge of developing country members seen since the 1950/60's (then known as GATT – the General Agreement on Trade and Tariffs). Initiatives include some preferential treatment for poor countries regarding tariffs (Goldstein, 2008, pp. 160, 162-163), concessions regarding intellectual property agreement for essential pharmaceutical drugs needed to treat disease in poor countries (Goldstein, 2008, p. 169), and training and capacity building for developing nation trade agreement envoys (Goldstein, 2008, p. 173). But these are minor changes in an international institution that treats each bargaining party as 'equal' when they are clearly not. The WTO is hardly to blame for the inequality among the member states it seeks to negotiate trade agreements between, but it is responsible for its claim that these agreement are legitimate and binding when poor countries agree to them under considerable duress. Rich country members of the WTO have failed to adequately reduce their own protectionist trade barriers, while pushing trade liberalization that damages poor country infant industries. Novel suggestions regarding improvements of international labour and environmental conditions, such as the linking of access to international markets with the acceptance of core labour standards in developing countries (Moellendorf, 2009, p. 104), have not been undertaken.

Similar institutional alternatives are available for the underdeveloped system of international property law that perpetuates the 'resource curse' (Wenar, 2011, pp. 32-39), and the system of international tax law that fails to deliver the full value of export revenue

to the poor countries that deserve it (Brock, 2009, pp. 128-130). Once again, little progress has been made toward reforming these institutions, with some rich countries²⁵ actively opposing reform.

4.4 Objections to the claim that we fail in our obligations to the global poor

4.4.1 Objection 1: Demandingness

One objection to the above account of our failure to fulfill our obligations of justice to the global poor is that these obligations are too demanding given what we know about the motivational and psychological limitations of human beings. According to this objection, we cannot expect the average person to fulfill these obligations because the demands that they place on their time, resources, and willpower are unreasonable. For various reasons, we should reject such an objection to the claim that we fail in our obligations to the global poor.

To begin, the demandingness objection may not be about obligation, but about responsibility appraisals. If so this objection misses its mark. Determining the content of our moral obligations is one project in ethics. Determining the appropriate grounds on which to hold agents praiseworthy or blameworthy for their actions is another. Perhaps the proponent of the demandingness objection is merely pointing out that while we fail in our obligations of justice to the global poor, we are not blameworthy for this failure. I do not think that the idea that we are not culpable for our failure is implausible, but it is not an objection to the fact that we fail in these obligations, only to how this failure relates to responsibility appraisals.

Assuming that the demandingness objection is about our obligations, one rather simple reply is that the demandingness objection has no force, because morality just demands what it demands (Lichtenberg, 2013, p. 99). According to this response, obstacles to the

²⁵ Canada has recently opposed efforts for global tax and extractive industry reform (Haga, 2013)

fulfillment of our moral obligations, such as insufficient time, or emotional difficulty parting from our holdings, carry no weight in our overall assessment of what we ought to do. If morality demands what it demands, complaints about demandingness are at least a distraction, and at most a way for unscrupulous agents to ignore their obligations. But many take this response to be unsatisfactory. Moral philosophy, it is argued, must in some way be sensitive to the actual limitations of human agents if it claims to be relevant to our actual moral lives (Lichtenberg, 2013, pp. 97-121).

A better response is to contest the factual claim that the time, resources, and psychological muster required to fulfill these obligations are in short supply. First, consider the time and resources required. The obligations that I detail have a clear cut-off point. When the global poor meet their basic needs, have attained adequate wellbeing, and have been freed from the burden of an unfair institutional structure, our obligations are met. Would this require a heroic transfer of resources on the part of the affluent? Thomas Pogge doubts that it would:

let us consider an initial, aggregate figure of 1 percent of aggregate global income, currently about 312 billion annually. This corresponds to the income shortfall that separates the 2,801million human beings who live below the World Bank's \$2/day (strictly: \$2.15 PPP 1993) poverty line from this line. Such an amount, if well targeted and effectively spent, would make a phenomenal difference to the poor even within a few years. On the other hand, the amount is rather small for the rest of us: close to the annual defense budget of the US alone [or] about half the market value of the current annual crude oil production. (Pogge, 2008, p. 205)

So the time and resources demanded for us to fulfill our obligations to the global poor might well be exaggerated by the demandingness objection.²⁶ Next, consider psychological

²⁶ The line of argument presented by Singer mentioned in §3.2.1 regarding redistribution from the richest of the rich to the poorest of the poor also provides support to the view that our obligations to the global poor are not overly demanding on our time and resources.

demandingness. Judith Lichtenberg has recently elaborated findings from moral psychology that show that an agent's perception of the demandingness of their actions is heavily influenced by their broader social environment (Lichtenberg, 2013, pp. 122-149). Our sense of demandingness is elastic, and can be reduced if we know that others around us are acting, or likely to act, in a similar way. Lichtenberg contends we can make considerable progress in reducing the psychological sense of demandingness of our obligations to the global poor if we act collectively on those obligations. There is no insurmountable obstacle of human psychology between us and the fulfillment of these obligations.

4.4.2 Objection 2: Specifying the requirements for fulfillment of our moral obligations to the global poor

Another objection to the claim that we fail in our obligations to the global poor criticizes my requirement for the fulfillment of an obligation, which was only implicitly stated. It is implausible, the objection goes, to assume that the requirement for the fulfillment of our obligations to the global poor is the complete eradication of global poverty and its structural causes. Rather, the correct requirement for the fulfillment of this obligation is that we, as moral agents, take the most appropriate steps aimed at fulfillment of these obligations, where the effects of these steps will be drawn out over time. Slow progress is all that is reasonable to demand in the face of a problem of the scope and complexity of global poverty, and as mentioned earlier, it is true that slow progress is being made. So then, is the claim that we fail in our obligations to the global poor too strong?

Let me elaborate on this important objection. At its root, this objection highlights a disagreement in how we are to specify in greater theoretical detail what exactly our obligations to the global poor are. Most agree that agents fulfill their moral obligation to x if and only if they x , but disagree on how exactly to detail our obligations (how to state x).

This disagreement can be traced back to Ross's discussion in *The Right and the Good* (Ross, 2003, pp. 42-44). Ross detailed three views regarding how we specify our moral obligations, and the requirements for the fulfillment of those obligations. Michael J. Zimmerman summarizes Ross's discussion as follows:

If on Monday you lend me a book that I promise to return to you by Friday, what precisely is my obligation to you and what constitutes its fulfillment? ... the answer may seem obvious: my obligation is to keep my promise, and I will fulfill this obligation if and only if I return the book to you by Friday. This [is only] the First Answer. ... the Second Answer: my obligation is to attempt to keep my promise, and I will fulfill this obligation if and only if I aim at your receiving the book by Friday. ... [the] Third Answer: my obligation is to do that which gives me the best prospect of keeping my promise, and I will fulfill this obligation if and only if I do that which is most likely to result in your receiving the book by Friday. (Zimmerman, 2006, pp. 577-578)

The First Answer includes a view of obligation known as the Objective View. On this view, the first²⁷ of the obligations that we have toward the global poor would be specified in the following way:

1*. We are obligated to ensure the global poor meet their basic needs

Zimmerman argues for the plausibility of the Third Answer (Zimmerman, 2006, p. 578), which implies what is known as the Prospective View of obligation. On this view, the first of the obligations that we have toward the global poor would be specified in the following way:

1**. We are obligated to do what is most likely to result in the global poor meeting their basic needs

Zimmerman explains that 'that which is most likely to result in my x-ing' is a function of the evidence available to a given agent (Zimmerman, 2006, p. 590). Agents are thus tasked

²⁷ Obligations (2) and (3) would need to be similarly revised, but the point can be made with (1).

with forming beliefs regarding ‘what is most likely’ in accordance with the evidence bearing on their situation. In this way, the Third Answer has an element of objectivity in that the evidence bearing on an agent’s situation seems objective, but there remains subjectivity in that the evidence available will vary from agent to agent.

We can now see that the objection outlined above can be stated more precisely as follows. The claim that we fail in our obligations of justice to the global poor assumes The Objective View of obligation (1*). It is claimed that we fail in our obligation (1*) because some of the global poor currently do not meet their basic needs. But the Objective View is implausible. We should instead endorse the Prospective View. On this view, the fact that *some* of the global poor do not meet their basic needs does not imply that we have not done what is most likely to fulfill our obligation (1**). So then our failure in our obligations (1**) to the global poor has not been established.

In response, we can grant that the Prospective View is the preferred way of further specifying the content of our obligations to the global poor, and still argue that we fail in these obligations. We only need argue that we have not done what is most likely to fulfill our (Prospectively framed) obligations to the global poor. The course of action that is most likely to meet our duties to the global poor is debatable, but as I have already said the gulf between what has been done, and what could have been done is too great to think that we have done what is most likely to fulfill these obligations. We could have done much more, and without demanding too much of ourselves or each other (see §4.4.1). As the evidence suggests we could have prevented deaths and improved wellbeing by allocating more money to foreign aid, and spending this money more effectively. But we did not. We could have further reformed global institutions that contribute to the persistence of global poverty in the many ways that experts have suggested. But we did not. In this sense, our failure is not that we did not eradicate poverty in our time (the Objective View), but that we did not

even undertake the actions that we knew were most likely to reduce poverty (the Prospective View). Sadly, we fail in our obligations to the global poor in both regards.

The purpose of this chapter was to argue for the claim that we fail in our obligations of justice to the global poor. I presented facts regarding our performance of three plausible duties toward the global poor that evidence this failure. I argued that two objections to the reality of this failure were implausible; one that focused on demandingness, and the other on how we should frame the content of our obligations and the requirements for their fulfillment. It is at this point, after establishing some version of our obligations to the global poor, and arguing that we fail in these obligations, that authors often move directly to the question: ‘How do we remedy this failure?’. But this line of questioning overlooks a critically important intermediate question. After the acknowledgement that we fail in our obligations of justice to the global poor we need ask: *Why* do we fail in our obligations of justice to the global poor? To answer this question, we must explore in more philosophical depth the idea of moral failure. In the next chapter, I will present two kinds of moral failure, and work to elaborate one that I think is critical to understanding our moral failure toward the global poor.

5. Exploring Moral Failure

5.1 Why do we fail?

Why do we fail in our obligations of justice to the global poor? This is the central question of this essay. Making progress on this question is important. If we are to effectively remedy our failures toward the global poor, then surely we must first understand those failures. Too often, we skip the critical intermediate question ‘Why do we fail?’ and hurriedly ask ‘How do we remedy our failures?’ This rushed treatment of normative problems is driven by the desire to – as quickly as possible – repair our broken moral relations. But the expense is an incomplete and oversimplified analysis of the causal mechanisms that lead to moral failure, and thus a set of solutions that are similarly incomplete and oversimplified. We owe the global poor, who have suffered and continue to suffer under conditions of poverty, a detailed reflection of our moral failures toward them.

5.2 Two Kinds of Moral Failure

To make progress toward an answer to my central question, I will begin by exploring two kinds of moral failure: motivational failure, and epistemic failure. I comment briefly on the former, but focus on the latter for the remainder of my discussion. To begin, let me highlight the distinction between these two kinds of moral failure with a colorful quote from none other than W.V. Quine:

Imagine a dog idling in the foreground, a tree in the middle distance, and a turnip lying on the ground behind the tree. Either of two hypotheses, or a combination of them, may be advanced to explain the dog’s inaction with respect to the turnip: perhaps he is not aware that it is there and perhaps he does not want a turnip. Such is the bipartite nature of motivation: belief and valuation intertwined. It is the deep old duality of thought and feeling,

of the head and the heart, the cortex and the thalamus, the words and the music. (Quine, 1979, p. 471)

Adapting Quine's case to our own, we might form two hypotheses in response to my initial question. Perhaps we fail in our obligations to the global poor because we do not care to fulfill them. Alternatively, perhaps we fail in our obligations to the global poor because of problems with the information relevant to the fulfillment of those obligations.

To illustrate, let me use a relatively simple example. Say that you promise to return a friend's car, which they have graciously lent you at no cost, by 5pm. Presumably promises like these generate obligations, in this case to return the car by 5pm.²⁸ As 5pm approaches, you recall your obligation, but decide that you would rather continue reading Tolstoy than return the car, and so you do not return it. You have failed in your obligation because you lacked the desire to fulfill it (or because that desire was outweighed by competing desires).

Alternatively, say you are at home reading Tolstoy, and recall your obligation to return the car by 5pm, which you have every intention to fulfill. You check your watch, which reads 4:00pm. You think to yourself – 'that leaves plenty of time to get the car back' – so you continue reading. But unbeknownst to you, your watch malfunctioned earlier, and it is now actually 5pm. You have failed to fulfill your obligation; but not because you did not care to fulfill it, rather because there was a flaw in the information pertinent to your obligation – an epistemic failure. We fail in our obligations in this epistemic way when we are ignorant of, misinformed regarding, or heavily and inappropriately discounting of, information relevant to the fulfillment of our obligations.

In Quine's case, both the motivational factor and the epistemic factor provide a distinct explanation of the dog's inaction with respect to the turnip. Similarly in the case of your

²⁸ This is the obligation on the Objective View. On the Prospective View, the obligation would be to 'do what is most likely to see that the car is returned by 5pm' (see §4.4.2).

promise, your inaction of not returning the car is explained in one case with reference your motivations, and in another with reference to your epistemic status. We should be careful to not lean too heavily on this motivational / epistemic distinction however. As Quine says, both factors might explain instances of inaction. Take the example of returning the car. Perhaps, in the case where I shrug off my obligation, I do so because I have had no prior exposure to a societal culture that takes promises seriously. In this sense, the reason that I lack the motivation to keep my promise is that I do not have prior epistemic exposure to fidelity regarding my promises. Conversely, in the case where my watch malfunctions, perhaps I am guilty of neglect in the maintenance of my watch due to a general lack of motivation to ensure my personal effects are in good keep. For each instance of inaction, we should not think that a simple causal story referencing one of either motivation or epistemic status explains said inaction. In reality, motivation and epistemic status seem intertwined as causal factors of inaction.

Important work has been, and continues to be done on the idea of motivational failure of our obligations of justice. One of the fundamental differences between early modern political theorists such as Hobbes, Hume, and Rousseau was their divergent opinions on the diversity of the basic motivational structure of human beings. Hobbes²⁹ is the most economical with our motives – thinking that we are primarily motivated only by fear and a strong sense of self-interest. Hume and Rousseau, in contrast, argue that humans have a diverse motivational structure, including natural sympathetic sentiments for others (Hume³⁰), and a sense of compassion for others (Rousseau³¹), along with self-interest. Rawls continued this discussion about the human motivational picture, framing it as the

²⁹ See Chapter 13: ‘Of the Natural Condition of Mankind, as Concerning Their Felicity, and Misery’ in *Leviathan* (Hobbes, 1651)

³⁰ See T 3.3.1 (Hume, 1739-1740)

³¹ See §2 of (Bertram, 2012)

problem of ‘stability’ discussed in Chapter 8 of *A Theory of Justice* and later in *Political Liberalism*. A stable institutional structure, for Rawls, is one that weights the scales of human motivation in favor of a preference to accord with the principles of justice. In tension with the motive to accord with principles of justice is the motive to free-ride – bending the rules of justice when it serves our interests. Rawls thought that to ensure stability, we must cultivate a ‘sense of justice’ in civil society that wins this motivational battle. More recently, Judith Lichtenberg has discussed motivational considerations in relation to our obligations to the global poor (2013, pp. 206-234). She argues, against the populist view of psychological egoism, that altruistic acts are possible, and goes on to explore how we can promote altruistic motives as a means to fulfill our obligations to the global poor.

These and other authors have made important progress in understanding the motivational component of our moral failures. In doing so, they have contributed to our understanding of how to remedy these failures. But as the examples above illustrate, this is only one kind of moral failure. In what follows, I will pursue a study of the equally important, yet underappreciated issue of epistemic moral failure. In doing so, I hope to similarly contribute to our understanding of how to remedy these failures. This project is especially important given that the motivational and epistemic components of moral failure are likely intertwined. In this regard, findings from one project could have important bearing on the other.

Why do we fail in our obligations of justice to the global poor? In order to make progress on this question, we need not decide which of motivational failure or epistemic failure is the primary or principal cause of our moral failure toward the global poor. Independent studies of each of these kinds of moral failure can still yield important insight into their differing influences. In what follows, I will develop the groundwork for a hypothesis that we fail in

our obligations to the global poor (at least in part) because we are ignorant of, misinformed regarding, or heavily and inappropriately discounting of, information that is relevant to the fulfillment of those obligations. That is, I submit that our failure in our obligations to the global poor is (at least in part) an epistemic failure.

5.3 Two Modes of Epistemic Failure

Agents can fail epistemically in their obligations in at least two ways. They may fail to *apprehend* their obligations. This is one particular *mode* of epistemic moral failure in which an agent fails to form the belief that they are under the force of an obligation that they are in fact under. The other mode of epistemic moral failure is exhibited in the watch example above. This is a more straightforward case of one's epistemic failure to *satisfy* the moral obligations that they properly apprehend due to flaws in the information available. Let me elaborate on this distinction between the two modes of epistemic moral failure with reference to the minimal set of obligations of justice to the global poor argued for in §3.1.

Say I believe that I have an obligation to ensure that the global poor meet their basic needs, but I (falsely) believe that the global poor currently *do* meet their basic needs, and so take no action in this regard. In this case, I properly apprehend my obligation but I fail to satisfy my obligation. I fail to satisfy my obligation because I have false beliefs about the world.

Another case: say that I am a libertarian. I think that distributions are just inasmuch as they accord with a set of principles of just initial acquisition, transference, and redress. But I (falsely) believe that there is no history of non-compliance with respect to these principles in our past distributive relations with the global poor. In this case, as a libertarian with the aforementioned (false) belief, I will deny that we have any duties of compensatory justice to the global poor. Here, I fail to properly apprehend my obligations. I fail to

apprehend my obligation because I have false beliefs about the relation between the world and my moral concepts, namely, the procedural view of justice. As a libertarian I ask: Is the actual distribution of goods procedurally just? This question cannot be answered simply by looking out at the world. To answer it, I also have to understand the concept of proceduralism as a method of distributive justification.

A final case: say that I claim to be a utilitarian. But in fact, I misunderstand utilitarian distributive theory. I (falsely) believe that utilitarian theory gives greater weight to already wealthy individuals in assessing the overall utility of a given distribution. As such, I deny that utilitarianism supports redistribution directed toward the poor, because I (falsely) believe the interests of the wealthy have some special priority. In this case, I again fail to apprehend my obligations. Here, I fail to apprehend my obligations because I get my theory wrong. I have reliable information about the world, but false beliefs regarding my moral concepts.

Let me state the concepts outlined here formally:

Moral Failure: We fail in our moral obligations just in case we do not fulfill our obligations.

Motivational Failure: If agents fail motivationally in their moral obligation, then i) they fail in their obligation and ii) the desire to fulfill their obligation either was not present, or failed to outweigh competing desires.

Epistemic Failure: If agents fail epistemically in their obligation to O , then i) they fail in their obligation and ii) are ignorant of, misinformed regarding, or inappropriately discounting of, information that is pertinent to the fulfillment of their moral obligation. This can happen in at least two ways. Agents fail to **apprehend** their obligation to O when either:

1. (misinformed) they believe (falsely) that m , where m is information regarding the moral concepts that ground O , and this (false) belief³² that m justifies their belief that they are not obligated to O .
2. (ignorant) they do not believe m , where m is information regarding the moral concepts that ground O , and their lack of belief that m perpetuates their lack of belief that they are obligated to O .
3. (discount) they believe that m , where m is information regarding the moral concepts that ground O , but they heavily (and inappropriately) discount m as a reason that they are obligated to O such that they fail to believe they are obligated to O .

Agents fail to **satisfy** their obligation to O when either:

1. (misinformed) they believe (falsely) that p , where p is information pertinent to the fulfillment of their obligation but is not among the set of moral concepts that ground O , and this (false) belief that p justifies their belief that they are not failing to O .
2. (ignorant) they do not believe that p , where p is information pertinent to the fulfillment of their obligation but is not among the set of moral concepts that ground O , and their lack of belief that p perpetuates their belief that they are not failing to O .
3. (discount) they believe that p , where p is information pertinent to the fulfillment of their obligation but is not among the set of moral concepts that ground O .
Furthermore, they heavily (and inappropriately) discount p and this justifies their belief that they are not failing to O .

³² We need not restrict this account to single beliefs. Indeed, a set of false beliefs $\{m\}$ might justify another false belief.

5.3.1 Truth of Whole Theories

One might be interested in a specific type of epistemic moral failure that I have not discussed. Say that I properly understand and ascribe to libertarian moral concepts about justice, but it turns out that these concepts are *false*. That is, libertarian thinking about justice does not reveal the truth about justice. But in this case, according to the definition of apprehension failure above, I *do not* fail to apprehend my obligations. This is because although I (falsely) believe that *m*, where *m* = 'libertarianism is true', I do not take *m* to justify my belief that I am not obligated to *O*. That is, I still believe I have libertarian obligations toward the global poor (for the reasons detailed in §3.2.2), even though libertarianism is false. But isn't this incorrect? If I believe a false theory of justice, don't I fail to apprehend my obligations?

My account of apprehension grants that the libertarian described above apprehends their obligations, since they believe they have obligations to the global poor as those obligations are detailed in §3.1. To account for this oddity, I can only say that I would advise against using my account of epistemic failure in tandem with assessments about the truth or falsity of whole theories of justice. For lack of a better description, my account of epistemic failure is not meant to delve this deep into matters of 'truth'. I think that significant progress can be made regarding the central question posed in this chapter, without having to deal with the question of what (if any) theory of justice is *true*. When I speak of agent's having false beliefs, I intentionally restrict the scope of these beliefs to uncontroversial factual claims about our world, and claims about reasonably well articulated moral concepts. I am concerned with false beliefs regarding the world such as 'nobody is undernourished', and false beliefs regarding well-articulated moral concepts such as 'utilitarianism claims we have inviolable rights'. In this way, I am not concerned

with the consequence, outlined above, that an agent's chosen theory of justice might be false, and yet that agent still apprehend their obligations to the global poor.

The purpose of this chapter was to explore the concept of moral failure, and identify the kind of moral failure I will focus on – epistemic moral failure. Given that a detailed study of moral failure is a crucial step toward the goal of repairing our moral relations with the global poor, we have good reasons to take moral failure seriously. Two kinds of moral failure were distinguished. Motivational failure is moral failure accompanied by a lack of desire to fulfill one's obligation, or the losing out of this desire in a competition among others. Epistemic failure, in contrast, is moral failure accompanied by flawed epistemic states (false belief, lack of true belief, inappropriate discounting of evidence) pertinent to the fulfillment of one's obligation. Research on both of these kinds of moral failure is important in making progress on my central question 'why do we fail in our obligations of justice to the global poor?' Focusing on epistemic moral failure, I distinguished between two modes of this kind of failure – failure to *apprehend* one's obligations and failure to *satisfy* one's obligations – and presented a formal outline of these concepts.

6. Epistemic Moral Failure and Global Poverty

Why do we fail in our obligations of justice to the global poor? I have suggested that our moral failures toward the global poor are epistemic moral failures. In the previous chapter, I outlined the theoretical groundwork for an epistemic account of moral failure. But in order to fully assess the plausibility of my claim that our moral failures toward the global poor are epistemic moral failures, a further question must be addressed. How exactly do we fail epistemically in our obligations to the global poor? My answer is this: *there are structural flaws in the flow of morally pertinent information within global society*. In this chapter, I present a basic model of information flow, detail three mechanisms by which an agent might suffer from epistemic moral failure, and argue that we do in fact suffer from this type of failure in our obligations to the global poor.

6.1 A Basic Information Flow Model

A basic model of information flow has three elements: source, transmitter, and receiver (Shannon & Weaver, 1949, p. 5). Information (explained in detail in §6.4.1) is embodied in the source (□), and travels via the transmitter (→) to the receiver (○) as shown pictorially in Figure 6–1.³³

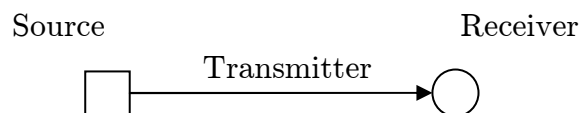


Figure 6–1: Basic Information Flow Model

³³ Of course, the actual flow of this information in global society will be much more complex than represented in Figure 6–1, but I take it that more complicated information flows could be modeled using these basic elements. Thus the findings from the basic model are still relevant for actual information flows.

If there is some failure in information flow, it will be located at one of these three elements. I call failure in information flow that originates at the receiver ‘up–take’ failure. I call failure that originates during transmission (rather unoriginally) ‘transmission’ failure. I call failure that originates at source ‘complexity’ failure. In what follows, I detail each of these three mechanisms of failure in the context of the flow of information pertinent to our obligations to the global poor. I will present three cases, mapped from the basic model, that quickly illustrate these mechanisms of epistemic moral failure. I will then expand on these cases by presenting evidence and argument that these mechanisms of epistemic moral failure are in fact prevalent in our actual moral relations with the global poor.

6.2 Up–take failure

Bob has a strong belief that the cause of global poverty is dispositional features of poor persons. Bob thinks that poor people lack the initiative, commitment, and cooperativeness that is essential for the societal wealth generation exhibited in developed nations. Bob has a set of life experiences in his home country regarding his interaction with the poor that, for him, reify this explanation of the roots of poverty, and he extends these life lessons to the case of global poverty. Bob does not believe that we have obligations of justice to the global poor. For Bob, the remedy to the problem of poverty is primarily in the hands of poor persons. They must change their dispositions and Bob believes that this is a project that only the individual can accomplish, and only the individual is responsible for. Bob is aware of, information that threatens his assessments of the roots of global poverty but weights his personal experiential evidence much heavier than this competing evidence. Bob’s beliefs are in tune with his wider social group – his coworkers, family, and friends – and he rarely interacts with individuals outside of this social group.

Research in psychology has revealed a troubling set of psychological barriers to appropriate moral concern for the global poor. Here, I will present findings from two areas – social and moral psychology.

6.2.1 Social Psychology

Findings from social psychology are relevant since these researchers document individual and group beliefs regarding various issues. Relevant to the problem of global poverty, social psychologists have found that, individualistic explanations of poverty³⁴ are held by many people (Campbell, et al., 2001). Individualistic explanations are essentially those held by Bob, which state that ‘responsibility for poverty is placed on the behavior of poor people’ (Campbell, et al., 2001, p. 410). These explanations can be contrasted with structural and fatalistic explanations. Structural explanations identify the causes of poverty in “external societal and economic forces”, and fatalistic explanations appeal to the influence of fate and luck. To be sure, most favor multiple explanations of poverty that draw from each of these three categories. In another study, Harper et al (1990) found that “the most popular explanations for [global] poverty included the inefficiency of [poor country] national governments ... exploitation by other countries and climate”.

These assessments of the causes of poverty spill over into views regarding the appropriate attitudes and behavior toward the poor. That is, what people believe the roots of poverty are in turn affects what they think we should do about it (Zucker & Weiner, 1993). Two problems arise from this social psychological research and the bearing it has on the individual’s conceptions of their obligations. First, the prevalence of individualistic

³⁴ The original research in this area focused on domestic poverty. I have tried to select studies that focus specifically on global poverty, but some of the findings and references will inevitably overlap with attributions regarding domestic poverty.

explanations is troubling in that it supports a non-relational³⁵ view of poverty, in which the rich have little to do with the plight of the poor. Second, structural explanations that focus solely on local country factors ignore the globalized context in which poor countries are politically and economically situated. As I pointed out in §2, it is important to acknowledge the relational aspects of the problem of global poverty as embodied in the many institutions that structure global relations. This research in social psychology reveals that many may be ignorant of or misinformed regarding this aspect of the reality of our moral relations with the global poor, and so fail to apprehend their obligations.

Furthermore, there is evidence to suggest that even when we are confronted with evidence that conflicts with such views, we rarely modify these attributions of poverty. The phenomena of ‘confirmation bias’ has been documented by psychologists whereby individuals give special and inappropriate weight to evidence that supports their existing beliefs, while discounting evidence that threatens these beliefs.

... confirmation bias [is] the tendency to seek out and interpret new evidence in ways that confirm what you already think. People are quite good at challenging statements made by other people, but if it’s your belief, then it’s your possession – your child, almost – and you want to protect it, not challenge it and risk losing it. (Haidt, 2012, pp. 79-80)

The inflexibility of our predispositions on poverty is further exacerbated by a tendency to align our political views with the established views of our wider social group. Research in political science has found that group affiliation is a much stronger predictor of political opinion than self-interest:

The political scientist Don Kinder summarizes the findings like this: “In matters of public opinion, citizens seem to be asking themselves not ‘What’s

³⁵ Though the non-relational view still leaves open obligations based on the rich’s ability to aid, and the poor’s need of that aid.

in it for me?’ but rather ‘What’s in it for my group?’ ” [...] Our politics is groupish, not selfish. (Haidt, 2012, p. 86)

Joshua Greene explains that this drive to conform to our social group’s political views is not surprising. He explores the example of those who are skeptical of the wealth of evidence in favor of the fact that global climate change is occurring and caused by human activity, and argues that this skepticism cannot be wholly explained as arising out of issues of self-interest (e.g. owning stock in oil companies) since mitigating the threats posed by climate change is actually in everyone’s self-interest. Rather, when we form these views our reasoning is often overtaken by the much more immediate threat of being socially ostracized in the event that our views differ from our social group. Instead of forming our beliefs in accordance with the evidence regarding how to best manage our physical environment, research suggests our beliefs are formed in accordance with how to best manage our immediate social environments (Greene, 2013, pp. 91-94).

[T]he lesson is that false beliefs, once they’ve become culturally entrenched – once they’ve become tribal badges of honor – are very difficult to change, and changing them is no longer a matter of educating people.

Given that views on the origins and proper remedies to problems of poverty are similarly culturally entrenched (Campbell, et al., 2001, pp. 410-411), these worries extend to our perception of that problem as well.

So social psychology reveals that we have established beliefs regarding the causes and remedies of global poverty, and that these beliefs are sometimes hostile to our properly apprehending or satisfying our obligations to the global poor. Furthermore, practices such as confirmation bias and groupish thinking make such beliefs difficult to change, even when we are confronted with information that suggests we ought to change them. But even

for those that are open to more nuanced accounts of the causes and remedies of global poverty, other psychological barriers still remain.

6.2.2 Moral Psychology

Moral psychologists are concerned with the formation and expression of moral judgments. In their research, they have found a strong sub-conscious preference to aid nearby victims. Joshua Greene and Jay Musen conducted a study that posed two hypothetical aid scenarios to respondents, and found a strong correlation between willingness to aid persons in need and distance from said persons:

In response to the versions of this scenario in which you are physically present, 68 percent of our subjects said that you have a moral obligation to help. By contrast, when responding to the versions in which you're far away, only 34 percent of our respondents said that you have a moral obligation to help. We observed this big difference despite the fact that, in the faraway versions, you have all of the same information and you are just as capable of helping. (Greene, 2013, p. 260)

Researchers have also found a strong preference to aid identifiable victims over anonymous victims (Greene, 2013, p. 263). If those in need of aid are people with names, stories and faces we can directly observe, we are much more likely to feel obliged to assist than if those in need are merely statistics. But the global poor are distant from us and we do not interact with them in a way that makes them relatable and identifiable. Thus, the sub-conscious psychological preferences to aid near and identifiable persons are further barriers to our apprehending our obligations toward the global poor.

These sub-conscious preferences likely have deeply embedded biological origins. When research in moral psychology pairs with theories of evolutionary psychology³⁶, we find an

³⁶ In what follows, I do not mean to suggest that our genotypes *determine* the existence of the psychological barriers. These are phenotypical features, and thus develop in tandem with gene expression in an environment.

account of our moral dispositions toward distant others that is not favorable toward our moral relations with the global poor. Our moral capacities evolved to support cohesion and coordination in small groups (Haidt, 2012, pp. 144-148). These small groups enjoyed greater survival advantage via group activities like hunting, gathering, sharing food and fighting off threats. Group selection occurred when these small groups competed with each other and within their environments. Those that cooperated best survived and reproduced. According to this story, there is little reason to think that our moral faculties have evolved in a way that would support a general moral concern for distant others. The survival advantage of small groups was sufficient for our evolutionary success. Research on the 'moral molecule' oxytocin has corroborated this view. Increased levels of oxytocin were found to cause subjects to develop stronger in-group relationships, with no similar effect on out-group relationships (Haidt, 2012, p. 234). Researchers have also found that we are endowed (even as infants) with the ability to pick up subtle cues in language and appearance that help us identify and favor in-group members over out-group (Greene, 2013, pp. 48-55). Altruism is a capacity that human beings have, but we are predisposed to *parochial* altruism, which primarily favors in-group members.

Why are our preferences toward the aid of near and identifiable victims and parochial altruism problematic in our fulfillment of our obligations to the global poor? They are problematic because moral psychologists argue that the moral judgments we form are greatly influenced by these sub-conscious preferences (moral emotions) (Greene, 2013, pp. 28-66, 105-147) (Haidt, 2012, pp. 1-84). Thus, our moral thinking about our obligations to distant, unidentifiable, out-group persons – as carried out alongside these emotions – is experientially different than our moral thinking regarding near, identifiable, in-group persons. Since these factors do not heavily influence the conception of our obligations to the

global poor as argued for in §3, they represent a distortion of our moral thinking regarding these obligations, and thus the potential for epistemic moral failure.³⁸

To summarize, these psychological barriers combine to form what I call the ‘up–take’ mechanism of epistemic moral failure. Information regarding the plight of the global poor is in many instances readily available. Why then, do many people still fail epistemically in their obligations to the poor? Part of the answer, here from social and moral psychology, is that there are psychological obstacles to our treating this information as salient, even when it is readily available.

6.3 Transmission failure

Gina believes that we have obligations to care for the poor and vulnerable. She donates to humanitarian relief initiatives when natural disasters strike poor countries, such as the 2006 Tsunami in the Indian Ocean, and 2013 Typhoon in the Philippines. Beyond these intermittent charitable acts, however, Gina does not believe that global poverty is a pressing moral issue. Gina lives in a country where the dominant media outlets do not report on international issues beyond the large scale natural disasters mentioned earlier. This combined with the fact that Gina works two part time jobs in order to pay for her undergraduate degree, means that she is generally unaware of the plight of the global poor. She does not have the time, or opportunity, to inform herself regarding the intensity of global poverty and its human costs. If Gina does not focus the majority of her time and energy on her work and studies, she would face even poorer job prospects in her domestic economy, which is in recession.

³⁸ This is definitely true for the universalistic theories, but also true for the associative theories. Even though the associativists take the in/out group distinction to be morally relevant, obligations to the global poor (out-group) remain.

Transmission failure occurs when information pertinent to the fulfillment of our obligations toward the global poor is not properly transmitted between source and recipient. Here, the information sources are the morally relevant features of the lives of the global poor and the facts regarding our relations with them. The recipients are those individuals who bear duties toward the global poor, and who require information to properly apprehend and satisfy these duties. Notice that a given piece of information might be properly transmitted to a recipient, but that recipient fail to up-take that information as discussed in the previous section. So too might a given piece of information fail to be properly transmitted, even though it would have had up-take had it been properly transmitted. Thus, these two mechanisms of epistemic failure are conceptually independent (though they do interact in ways discussed in §6.5). Here, I am concerned with elaborating plausible ways in which the transmission mode of epistemic moral failure operates in the actual world.

The most obvious threat of transmission failure is the simple fact that the global poor are almost all physically very distant from the individuals who bear duties toward them. We are all familiar with the limitations of our sense perceptions, or what could be called our 'basic' information gathering abilities (sight, hearing, and so on). We acquire plenty of information about our world and the moral relations we have from within this small sphere, but the global poor are not a part of it. Of course our information gathering activities are not restricted to this small sphere. Human beings can share and interpret information over vast distances through language, memory, and technology. Here, I will discuss two familiar transmitters of information regarding the plight of the global poor in the modern age: media outlets and aid agencies.

6.3.1 Modern Information Infrastructure

Most media coverage that the average citizen of an affluent country is exposed to is heavily biased toward reporting on domestic issues rather than international. Research by the Oxford Internet Institute reveals that Sub-Saharan Africa (the poorest of geographical regions) is the most disconnected region in terms of news stories reported between 1979 and 2013 (2013b). Furthermore:

Countries in Sub-Saharan Africa ... are home to a relatively small number of reported events: with most of what is written about focused on just a handful of the region's 47 countries. Note for instance that we see relatively little content about ongoing, and costly, conflicts in the Democratic Republic of the Congo, despite the heavy focus on conflicts in other parts of the world like Israel/Palestinian Territories and Afghanistan. (Oxford Internet Institute, 2013a)

It is not unreasonable that media outlets give preference to domestic issues, as we have numerous obligations to our co-nationals that require good information to fulfill (see §3.3.1–3.3.2). However, the persistence and severity of global poverty is rarely represented as a newsworthy topic. Of the media coverage that does report on global poverty, often the problem is portrayed as an 'event' rather than the drawn out process that it is, leading viewers to have an overly simplified notion of the roots and remedies to poverty. Susan Franks, commenting on media coverage of the 1984 famine in Ethiopia, points out that:

Famine is typically a slow burning process but the media reporting characterized it as a sudden event. The news reports told a powerful tale about a suffering population and kept it very straightforward. The complicated political nature of the famine was dropped in favor of a simple story about failing rains and people in terrible distress whom we should help. (2013, p. 90)

I will call the case where morally pertinent information does not reach the recipient at all (e.g. a lack of reporting on global poverty) a *total* transmission failure and the case where

some information reaches the recipient but the remainder has been distorted in some way (e.g. overly simplified reporting on global poverty) a *partial* transmission failure.

Alongside media outlets, aid agencies also play a large role in our perceptions of the global poor. They are similar to media outlets in that the primary goal of their information distribution is often revenue generation, with awareness building only a secondary goal. But many aid agencies are well aware of the research in social psychology mentioned in §6.2. As such, they structure their advertising to maximize their chances of revenue generation. The global poor are thus primarily presented as ‘identifiable victims’, often children. While the incremental revenue generated from these strategic marketing choices is arguably a good thing³⁹, the distortion of the information regarding the global poor is yet another case of partial transmission failure. Again, the problem of poverty is viewed as an event that a given individual can act to immediately alleviate, and this is a gross simplification of our moral relations to the global poor (Campbell, et al., 2001, p. 425). Too much emphasis is placed on aiding identifiable victims of disaster at the expense asking how disasters could be mitigated before they occur. Susan Franks presents the following case:

The Mozambique floods of 2000 were a clear example of this. About 6 months before the floods occurred Mozambique had put out an appeal to the international community for \$2.7 million for boats, tents, and other necessary supplies. It received less than half this amount. However, once the floods materialized – as had been anticipated – then Mozambique received over \$100 million in emergency assistance ... If the impact of the flooding had been mitigated by the earlier modest expenditure there may not have been a disaster or at least nothing on such a dramatic scale. (2013, p. 156)

³⁹ It will, after all, go toward helping the global poor, and it is possible that this revenue could not have been generated otherwise.

Of course there are other mediums through which we might access information regarding the plight of the global poor that are not part of traditional media (newspaper, television, radio). Many people access information through the internet in a way that allows them to choose among various sources and perspectives. Since, like traditional media, internet reporting is still a profit seeking enterprise, information regarding the lives of the global poor is relatively scarcer than other more lucrative issues. Furthermore, there is the worry that the greater degree of user control over the source of online information could further fuel confirmation biases by allowing users to preferentially gather information that reifies established beliefs.

It is also important to point out that we should not treat our physical distance from the global poor as the only driver of transmission failure. In the case above, one of Gina's main obstacles to informing herself of the plight of the poor is that she lacks the *time* to do so. Note also that her crowded schedule is not entirely Gina's own choosing. It is also the result of social expectations regarding the amount of time that citizens must spend working and studying that reflect the wider society's willingness to support citizens in their educational pursuits. Gina has to work two jobs because her schooling is expensive, which it would not be if there was better funding for post-secondary education available. Total transmission failure occurs in this sense because the recipient of the information is currently in a state of information overload – they are processing information at near the maximum rate – and new information cannot arrive at the recipient.

6.3.2 Experiential Information

Recent work by Elizabeth Anderson has highlighted another important issue regarding the transmission of information flow and our obligations of justice. The history of racial segregation in the United States is often cited as a prime example of social injustice. Anderson argues that this kind of injustice is not necessarily sustained by a direct prejudice

or intent to subordinate another group (i.e. motivational failure), but is rather the result of a systematic social *distancing* of one group from another (2010). Segregation is self-supporting because it prevents certain groups from sharing experiences with others. When schools, neighbourhoods, and workplaces are heavily segregated, citizens cannot share stories about common struggles, they cannot develop friendships across racial lines, and they cannot accomplish group projects together. Under segregation, citizens are deprived of information about the lives of others. In the place of this gap in information, segregation gives rise to stereotypes, and myths about 'natures' that conform to pre-established segregation roles. At its extreme, this distancing can lead citizens to view out-group members as outsiders – people to whom they do not have obligations of justice at all.

Anderson argues that the solution to the (continuing) ills of segregation is not found simply in increased *access* to information regarding the lives of others. Rather, what is required is the reestablishment of the shared experiences that citizens are deprived of under segregation. What is required is *integration*. Anderson describes integration as occurring in four temporal stages: (1) formal desegregation, (2) spatial integration, (3) formal social integration, and (4) informal social integration (2010, p. 116).

Anderson's work highlights an important issue in information flow. It would be wrong to assume that the information pertinent to the fulfillment of our obligations is purely propositional. Taking notice of this, integration seeks to establish proper flows of *experiential* information. Propositional information is embodied in states of affairs that can be said to be true or false (e.g. 'Nigeria is Africa's largest oil exporter' is a proposition, embodying propositional information), while experiential information is embodied in a subjectively experienced state of affairs, including emotional content, and interpretation through social contexts (e.g. 'Wayne knows what it is like to be a Nigerian' is an experiential knowledge claim, and embodies experiential information for Wayne).

If experiential information is a critical form of information required to fulfill our obligations of justice, as authors such as Anderson argue, then the immediate worry for our moral relations with the global poor is that modern information infrastructure does not deal in this type of information at all. Experiential information cannot be transmitted by print media, television or internet, but is uniquely found in our formal and informal social interactions. Thus, there is a total transmission failure of this *type* of information in its entirety.

To summarize, information pertinent to our moral obligations to the global poor does not, in many cases, reach those who bear those obligations. At the most basic level, the global poor are too far from us to allow us to collect information from within our normal field of view. Media outlets and aid agencies that extend our ability to gather information do not do so without problematic biases or distortions of this information. Our information processing capacities can be restricted given our limited time and resources, leaving us under informed on important issues. Finally, critically important experiential information is not even amenable to transmission within the established information infrastructure.

6.4 Complexity failure

Andy is struggling to understand the problem of mineral extraction in the developing world and decide how he should factor this problem into his personal decision making. During his research, he has come across many different perspectives on this problem. Some argue that we should ban all mineral imports from those countries that we know exploit their natural resources with such disregard to the public interest that this exploitation amounts to a kind of theft. Others critically reply that this will only block out extractive firms which have at least a chance of being influenced by mindful consumers (like Andy)

and in their place, leave firms that are sure to pay no attention to the environmental and human costs of mineral extraction. Still others point out that mineral imports are only the tip of the iceberg, and it is the inclusion of minerals in consumer goods manufactured abroad (like electronics) that are the real problem. Each time Andy reads one of the many different perspectives, he finds himself learning something new, and it dawns on him that he is under-informed regarding this problem. There are likely many perspectives he has yet to discover and consider, but he needs to make a decision about what he should do sooner rather than later. Reeling from the mass of information before him, Andy decides to carry on with his normal consumer practices, but donate extra money to charities that work in mineral exporting developing countries.

While up-take failure can be said to locate epistemic failure at the information recipient, and transmission failure said to locate epistemic failure in the transmission medium, complexity failure focuses on the threat of failure posed by the source of the morally relevant information. Above, Andy is vulnerable to epistemic moral failure due to the complexity of the problem of mineral extraction in developing countries. To properly understand this problem, one must be aware of a large number of facts, and a large body of evidence bearing on those facts. Andy struggles to inform himself of all these facts and of the relevant evidence in order to gain the proper understanding of the situation. Epistemic failure will arise in this case when Andy forms a false belief regarding one of the many relevant facts, overlooks one of these facts, or heavily and inappropriately discounts some of the large body of evidence bearing on the situation. It is because of the complexity of the moral problem in question that Andy faces these threats.

The concept at work here that needs elaboration is the idea of complexity. When I say that the reality of our moral relations with the global poor is 'complex', what do I mean by

that? To answer this question, I'll begin by claiming that the complexity of a given situation increases in proportion to the *quantity of information* embodied in that situation. To elaborate on how information can be quantified, I'll appeal to Claude E. Shannon's theory of information (also known as the 'mathematical theory of communication') (Shannon & Weaver, 1949). Next, I'll argue that our moral relations with the global poor in fact embody a large quantity of information, and are thus complex. Finally, I'll explain how this formal view of complexity helps us detail how this particular mechanism contributes to epistemic moral failure.

6.4.1 Quantifying Information

The familiar unit of measure for a given quantity of information is the 'bit'; this is short for 'binary digit' (Shannon & Weaver, 1949, p. 100). Shannon's theory provides a method for calculating the number of bits in a given information system.⁴⁰ Say there is a fair coin toss happening in the room next door, and a courier is tasked with informing us of the result by writing 'H' for heads or 'T' for tails on a piece of paper and bringing it to us. If we pictorially represent the coin toss – the source of the information – as a box, we can represent the two possible outcomes (Heads or Tails) as lines extending left from the source. One of these possibilities will actualize, and this will be reported to us by the courier, who can be represented by a line. The receiver of the information is represented by a circle.



Figure 6–2: Fair Coin Toss

⁴⁰ I will use the term 'system' to refer generally to a set of alternatives of varying probability that can be mathematically assessed using Shannon's theory.

Shannon defines quantity of information in terms of the reduction in uncertainty for a given situation for which there are possibilities with varying probabilities. In our case, we have two possibilities of equal probability (again, the coin is fair, or balanced): Heads and Tails. Waiting in our room for the courier, we are uncertain of the outcome of the coin toss. But when the courier arrives, they reduce this uncertainty by handing us the piece of paper with either H or T on it. This message has an amount of information in proportion to the amount of uncertainty reduced in revealing the outcome of the coin toss.

Shannon's theory provides two ways of mathematically quantifying information. The first, which quantifies the information embodied in a given message, is called the 'surprisal value' by Drestke (1981, p. 10). It is calculated with the formula:

$$I(x) = \log_2 (1 / p_x)$$

Equation 6–1: Surprisal Value

Where $I(x)$ is the surprisal–information on the piece of paper, and p_x is the probability of the given message: 'H' = 0.5 and 'T' = 0.5 for our balanced coin. Say the coin comes up heads, and we receive the message 'H' on our piece of paper. Let's do the math to calculate the amount of information (surprisal value) in this message:

$$I('H') = \log_2 (1 / p_H)$$

p_H is the probability that the coin will land heads, which is 0.5, so then

$$I('H') = \log_2 (1 / 0.5)$$

$1 / 0.5 = 2$, so then

$$I('H') = \log_2 (2)$$

Generally, $\log_x (y) = ?$ is the question $x^? = y$. Since $2^1 = 2$, $\log_2 (2) = 1$.

$$I('H') = 1 \text{ bit}$$

So, there is 1 bit of information in the message 'H'. You can do the math for 'T' to see that there is also 1 bit of information for that message. Notice that if we let the number 1

stand for the message 'H' and 0 for the message 'T', we can represent the possible outcomes with 1 binary digit (hence the fact there is 1 bit of information in either outcome). This explains why the term 'binary digit' (bit) is appropriate as the unit of measure for information. If the courier reported the result of two successive coin tosses to us, then they would need two binary digits to do this; 1–1 would mean heads–heads, 0–0 would mean tails–tails, and so on. In this situation, there is 2 bits of information, as two binary digits are required to inform us of the outcome.

We can see that the fact that both messages embody the same quantity of information is because they are equally likely outcomes ($p_H = p_T$). Let's see what happens when the coin is not balanced, making the outcomes unequally likely. Say that our biased coin comes up heads 90% of the time ($p_H = 0.9$) and tails 10% of the time ($p_T = 0.1$) (Dretske, 1981, p. 10). Now $I('H') = \log_2 (1 / 0.9) = 0.15$ bits, and $I('T') = \log_2 (1 / 0.1) = 3.32$ bits. So when we receive 'H' as a message, that contains 0.15 bits of information, and when we receive 'T' as a message, that contains 3.32 bits of information. This matches our intuitions. Sitting in the room, wondering what the outcome of the unbalanced coin toss is, we know that there is a 90% chance it will come up heads. Thus, when we receive the message 'T', this is more surprising (hence the term surprisal value) than if we receive the message 'H', because 'T' is much less likely.

To see the motivation for the second method of information quantification, we can ask the following question. Is there more information embodied in the biased coin toss or the fair coin toss?⁴¹ Notice that this is not the same as the question 'What is the information embodied in 'H' as a *particular outcome* of a coin toss?' Our new question is about the

⁴¹ I do not mean to say that states of affairs embody information. The coin toss has information only from the perspective of agents who are uncertain about the outcome.

information embodied in the coin toss *itself* (given our uncertainty regarding the outcome), not in any particular outcome.

Our intuitions might say there is more information in the fair coin toss, since it is easier to predict how the unbalanced coin will turn up. After all, it would be very easy to predict how the coin would turn up if it was a *trick* coin – with heads on both sides. The information embodied in any toss of a trick coin would be zero (0 bits), since we have no uncertainty as to whether the coin will come up heads, and so there is no reduction in uncertainty regarding the outcome. Enough with intuitions, let's see what the mathematics say. Shannon's formula for the *average information embodied in a system* is:

$$I(s) = \sum_{i=1}^n p_i \log_2 \left(\frac{1}{p_i} \right)$$

Equation 6–2: Average Information Embodied in a System

We take each outcome, calculate its surprisal value and then multiply this value by the probability of that outcome. All of these values added together yields the *average information embodied in a system*.⁴² Let's see what the average information embodied in the biased coin toss is:

$$I(\text{'biased coin'}) = 0.9 \log_2 (1 / 0.9) + 0.1 \log_2 (1 / 0.1)$$

$$I(\text{'biased coin'}) = 0.9 (0.15) + 0.1 (3.32) = 0.467 \text{ bits}$$

And for the fair coin toss:

$$I(\text{'fair coin'}) = 0.5 \log_2 (1 / 0.5) + 0.5 \log_2 (1 / 0.5)$$

$$I(\text{'fair coin'}) = 0.5 (1) + 0.5 (1) = 1 \text{ bit}$$

So, our intuitions are legitimized by mathematics; there is less information embodied in the biased coin toss than in the fair. The purpose of this section has been to present an important element of Shannon's mathematical theory of communication which provides a

⁴² In this case, the system is an agent's set of beliefs regarding possible outcomes.

plausible method of quantifying i) the amount of information embodied in a given outcome that is realized from among a range of possibilities with varying probabilities (surprisal value) and ii) the average amount of information embodied in a given system of possibilities with varying probability for which the outcome is not determinate. Shannon's theory allows us to answer the question 'how could we quantify information?' which is of critical importance in defending my claim that our moral relations with the poor are complex inasmuch as those relations embody a large amount of information. What remains to be seen is why the (quantifiable) amount of information embodied in our moral relations with the global poor is *large*.

6.4.2 Information Embodied in our Beliefs Sets Regarding the Global Poor

Before stating the features of our moral relations with the poor that drive up the information embodied in those relations, we need to amend Shannon's theory of information to model the complexity of an epistemic situation for a given agent. Let us borrow an idea from contemporary epistemology that an agent can be said to have varying degrees of belief.⁴³ Say that an agent believes that p and furthermore is certain that p . Modelling this situation in Shannon's context⁴⁴, we assign (or rather, the agent can be said to assign) 100% probability to p over not- p , not- p being the only alternative.

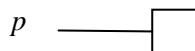


Figure 6–3: Average Information with No Uncertainty

⁴³ I do not mean to endorse the idea of degrees of beliefs without argument, nor to say that the average agent endorses this view. The idea of degrees of beliefs is merely a tool I appropriate to explain my account of complexity.

⁴⁴ I have omitted the parts of the diagram that represent the transmitter and receiver, since I am focusing on average information content of the system, and not surprisal value of any particular outcome. When calculating average information content, the actual message transmitted is of no concern.

What is the information embodied in this situation? It is easy to see that the surprisal value of p is 0 bits, and the average information in the system is 0 bits. Therefore, when an agent is certain of their belief that p , there is no information in this system. But for many of our beliefs relevant to our moral relations with the global poor, we have some (small) degree of uncertainty. As soon as we allow this, information enters the system, as we can model it using Shannon's theory.

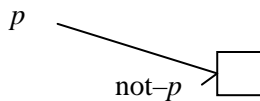


Figure 6–4: Information Embodied in High Certainty Beliefs

Now p has a 90% probability for the agent, and $\text{not-}p$ 10%. Like our weighted coin example, the quantity of information in this system is small – only 0.467 bits. But arithmetically, many small bits of information can still add up to a large amount. If it is true that the reality of our moral relations with the global poor task us with holding a large number of beliefs like those portrayed in Figure 6–4, then the amount of information in that entire belief system is large.

I argue that the reality of our moral relations with the global poor does indeed task us with holding a large number of beliefs for which we can have a high degree of certainty. Again appealing to a distinction drawn earlier (§5.3), our beliefs regarding our moral relations with the global poor can roughly be split into two categories: i) the beliefs we have about our moral concepts relevant to our relations with the global poor and ii) the beliefs we have about those worldly facts relevant to our relations to the global poor.

Regarding (i), some agents might have only a few such moral beliefs. Take a libertarian for example. They will have beliefs regarding the importance of rights, the validity of procedural justifications, and the principles that comprise those procedural justifications.

Other agents might be pluralists however, holding multiple such beliefs (e.g. libertarian, egalitarian, utilitarian). As such, pluralists have more information embodied in their moral concepts than monists.

Our moral concepts will combine with (ii) beliefs about worldly affairs directly related to these concepts to provide our conception of our obligations to the global poor. For example, my libertarian beliefs outlined above combine with my further belief that there is a history of non-compliance with respect to the procedural principles of justice yields (with appropriate moral reasoning) the conclusion that I have obligations of compensatory justice toward the global poor. In this sense, the number of beliefs required for us to properly *apprehend* our obligations might not be large. However, there are other modes of epistemic failure we need be wary of. While we might properly apprehend our obligations with only a small number of beliefs, it seems less plausible to be confident that we can *satisfy* those obligations with a similarly small number of beliefs.

The set of beliefs required to properly satisfy our obligations to the global poor will include those worldly facts that are pertinent to the fulfillment of our obligations. As I mentioned earlier in §4.4.2, there are a range of views on what is required to fulfill an obligation. One plausible account is that we ‘do what is most likely’ to fulfill our obligation (the Prospective View). On this account, our beliefs need to be formed in correspondence with the vast body of evidence regarding how to best go about meeting our obligations to the global poor (Zimmerman, 2006, p. 590). This is no simple matter. One could review §2 above as a starter set of facts relevant to our moral relations with the global poor. Next, consider this further sample. There is a longstanding discussion within the field of development economics regarding the roots of global poverty (or conversely, global wealth). As one’s view on the roots of poverty informs one’s views on the proper policy approaches to poverty, this debate is important to understand if we are to fulfill our obligations to the

global poor. Three theses are popular in this debate (Risse, 2005, p. 85). The ‘geographical’ thesis states that differences in wealth and poverty are driven by geographical features such as climate, terrain features, natural resources, and disease burden. The ‘market integration’ thesis states that differences in wealth and poverty are driven by the degree to which a given economy is integrated into the global trade network. The ‘institutional’ thesis states that these differences are driven by the quality of domestic institutions such as stable political regimes, reliable property rights, independent judiciaries, and good infrastructure. On each of these theses, there will be a set of facts, for each economy or nation in question, that help explain the causes of their relative wealth or poverty. It is plausible that all three of the theses reveal an important causal factor of relative wealth and poverty (Risse, 2005, pp. 85-86), and so the facts related to each are relevant to our moral relations with the poor. In addition to this set of facts, there is also the importance of complementing a ‘macro’ view of poverty of the kind found in development economics for which entire countries are the focus of analysis, with a ‘micro’ view of local community economics that incorporates regional differences within countries. This more ‘fine combed’ approach further expands the set of relevant facts as policies need to be tailored to the specifics of certain regions and communities rather than trying to employ one-size-fits-all policies.

I have argued that the reality of our moral relations with the global poor tasks us with holding a large number of beliefs for which we can have a high degree of certainty. Most of these beliefs are those that are required for us to satisfy our obligations. These are beliefs regarding policy questions of how we do what is most likely to end the human suffering caused by poverty, and restructure the global institutions that in part perpetuate this suffering. But the story of complexity is not done yet. Thus far, I have been focused on those beliefs for which we can have a high degree of certainty – like those modelled in

Figure 6–6 below. What about those beliefs for which we do not have a high degree of certainty? Compare two situations, i) Figure 6–6 in which we have a high degree of certainty of our belief that p (90% for p , 10% for $\text{not-}p$) and ii) Figure 6–5 in which we are close to equally uncertain regarding p and $\text{not-}p$ (60% for p , 40% for $\text{not-}p$).

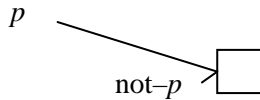


Figure 6–6: High Certainty Belief

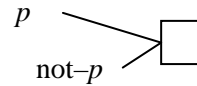


Figure 6–5: Moderate Certainty Belief

As explained earlier, the amount of information embodied in Figure 6–5 is larger than that of Figure 6–6 (according to Shannon’s theory of information). This amount of information will go up in proportion to two factors: i) the number of relevant alternatives and ii) the degree to which the probabilities among the relevant alternatives are equal (i.e. the degree to which the probabilities are uniformly distributed). Amending Figure 6–5 to increase the number of alternatives ($p = 60\%$, $q = 20\%$, $r = 20\%$) looks like this.

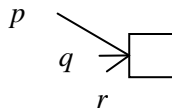


Figure 6–7: Multiple Alternative Beliefs with Moderate Certainty

If we calculate the information in the system, we can see that it has increased.⁴⁵ Amending again toward a uniform distribution (where the probability of each alternative is 1 divided by the total number of alternatives) looks like this.

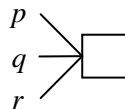


Figure 6–8: Multiple Alternative Beliefs with Low Certainty

⁴⁵ See Appendix A

Again if we calculate the information in the system, we can see that it has further increased.⁴⁶ Do our beliefs regarding our moral relations with the global poor exhibit this kind of complexity?

Many of our beliefs related to our moral relations with the poor *are* like this. A common experience among those who seek to inform themselves better regarding their relations with the global poor is uncertainty regarding which among a variety of views they should endorse. Given the evidence available to the average epistemic agent, there a large number of relevant alternative approaches to combating the problems of poverty, among which it is reasonable for an agent to be uncertain as to which to believe is the approach most likely to satisfy their obligation. Consider this question: What is the best policy approach to combating the ‘resource curse’⁴⁷? As mentioned in Andy’s case above, there are many relevant alternative views. The degree of uncertainty one has about these many alternatives is a strong function of the evidence available to them regarding the subject.

But it is unreasonable to expect that the average citizen has a robust amount of background evidence regarding many of these kinds of questions, especially in light of our previous discussions of up–take and transmission failure.⁴⁸ As such, there are many questions for which the evidential basis held by the average epistemic agent makes it difficult for them to adjudicate between the alternatives. In terms of information theory, this drives up the uniformity of the probabilities of the relevant alternatives, and so the information content of the system.

Once again, the types of beliefs I have been discussing are predominantly related to how we go about satisfying our obligations. They are beliefs related to our policy choices. But

⁴⁶ See Appendix A

⁴⁷ See §2.4

⁴⁸ I will revisit this claim in §6.5.

let me briefly comment on how the driver of complexity under discussion also relates to our moral beliefs. Sometimes the uncertainty that grips us in our deliberations about policies is rivaled by the uncertainty that grips us regarding what kinds of moral considerations are relevant in a given situation, how we rank these considerations, and how we balance competing considerations in our policy choices. This is not a problem for those who are monists and confident in their moral beliefs. Rather, it is a problem for those that eschew monism in favor of pluralism, and who are concerned with how the varying moral factors that are relevant interact and ought to be prioritized in our policy choices. Combining this point with the one made previously⁴⁹ we can see that the pluralist will, overall, have more complex relations with the global poor than the monist.

In summary, there are two important drivers of complexity in our moral relations with the global poor.

1. There are a large⁵⁰ *number* of facts (of which we may reasonably be certain) that we must believe in order to properly apprehend and satisfy our obligations to the global poor.
2. Given the evidence available to the average epistemic agent, there are a large number of relevant alternative approaches to combating the problems of poverty among which it is reasonable for an agent to be uncertain as to which to believe is the approach most likely to satisfy their obligation.

⁴⁹ The pluralist has a larger number of moral concepts that they believe with a high degree of certainty (page 78).

⁵⁰ I am now able to comment on what might have been a lingering concern for the reader since I first started speaking of a 'large' amount of information, and this is the question 'large relative to what?' I think that there are moral situations we can compare to the problem of global poverty that arguably embody a much smaller amount of information. Promises made to oneself regarding oneself seem to be the most ready case (e.g. I promise to not lock my keys in the car anymore). The average agent will have ready access to the body of evidence surrounding these obligations given their familiarity with their self and the situations they find themselves in. As such, the uncertainty among the relevant possible alternatives approaches to fulfilling their obligation is low. The number of beliefs required to fulfill such obligations similarly seems low.

Both of these drivers increase the amount of information in our moral relations with the poor (according to Shannon's theory of information) and so make those relations complex.

Finally, I need to connect these ideas of information and complexity back to the issue of epistemic moral failure. How is it that the complexity of our moral relations with the poor translates into epistemic moral failure? An analogy will be helpful here. Imagine you have been recruited to oversee a social science experiment in which a set of test subject are tasked with completing a quiz on issues related to our moral relations with the global poor. The test is comprised of a series of questions for which there are 'correct' answers in the sense that there is a reasonable degree of consensus among experts researching these areas as to what the 'correct' answer is.⁵¹ As the subjects sit down to write the quiz which you will later grade, you could think to yourself "How confident am I that the subjects will get at least some of the questions wrong?" Mathematically, your confidence in this regard should scale with the two considerations I have raised (see Appendix A). If there are more questions on the quiz, then you would be more confident that the subjects will get at least some questions wrong, even if the probability of getting any one wrong is quite low. If the questions on the quiz are such that the average person will be merely guessing at the answer, then you would be more confident that the subjects will get at least some questions wrong. A subject getting a question wrong is analogous to epistemic moral failure. As I have argued, the reality of our epistemic situation regarding our relations with the global poor is analogous to a very long quiz with many questions that would stump the average person. In this way, the complexity of this situation contributes to our epistemic moral failure of our obligations toward the global poor.

⁵¹ I am revealing here an assumption that there is some standard of truth against which we can judge the epistemic success of agents in their relations with the global poor.

6.4.3 Complexity and the Dogmatist

A problem for the account of complexity outlined above might be posed by the dogmatist. Dogmatists have a very small set of beliefs (moral and factual) for which they staunchly proclaim certainty regarding. Since their belief set is small, and certain, it embodies only a small amount of information – according to Shannon’s theory of information – and so is not complex. This means that it is unlikely that the dogmatist suffers from complexity failure. But surely we want to say that they suffer from some kind of epistemic failure. Is it problematic that my account of complexity failure does not diagnose the dogmatist as suffering from complexity failure?

I do not think it is. In §6.2 I outlined the up–take mechanism of epistemic moral failure, and I think the dogmatist is best seen as especially gripped by this mechanism of failure. Though there is, I think, a way of expressing how the dogmatist goes wrong in terms of complexity. We can say that the dogmatist is not sensitive to the reality of the problem of global poverty. They do not structure their belief set to correspond to the large body of evidence bearing on this situation – as they *ought* to. If they did, they would have many beliefs about the problem of global poverty, and considerable uncertainty regarding many of these beliefs. This would make their belief set complex (as it *ought* to be). Our diagnosis of the affliction of the dogmatist is thus two–fold. First, they seem to suffer from up–take failure in that they are not sensitive to the evidence bearing on the problem of global poverty. Second, this lack of sensitivity yields a belief structure that is not complex, as it ought to be. The dogmatist’s epistemic failure is only *represented* by the fact that their belief set is simple, rather than complex. But their epistemic failure is best understood as up–take failure.

6.4.4 Division of Epistemic Labour and Complexity

Consider an important objection to the account of the complexity mechanism of epistemic failure presented above. The core of this objection is that my account of complexity rests on an overly individualistic account of our epistemic lives. Above, I have assumed that each person needs to hold a set of beliefs relevant to their moral relationship with the global poor. The size and internal uncertainty regarding this set of beliefs makes that set complex, and so those agents who depend on this set to meet their obligations are prone to epistemic moral failure. But don't we have well established practices of epistemic authority, testimony, trust, and specialization that allow us to distribute the burden of the complexity of this set of beliefs over a larger group? It seems implausible to claim that each individual must hold the beliefs in question. Why can't some individuals specialize in some beliefs, others specializing in other beliefs, until together as a group all of the beliefs are covered by at least some people.⁵² There is then the acknowledgement within the group that some members are specialists in their beliefs, and can be trusted to in their testimony to others regarding these beliefs. For example, many trust the findings of climate scientists that the effects of climate change will disproportionately harm the global poor (Intergovernmental Panel on Climate Change, 2014, pp. 9, 19-21). My uncertainty regarding this belief is greatly reduced by my choice to trust the testimony of climate scientists rather than to epistemically 'fend for myself'. Similarly, the climate scientist can trust your testimony, as a development economist, that there is empirical evidence to support the continuation (rather than cessation) of certain kinds of targeted bi-lateral aid to poor countries. This kind of reciprocal epistemic reliance can cascade across a larger group, and the effect will be to reduce the uncertainty of a large set of beliefs for a large

⁵² Pettit and List have argued for the theoretical plausibility of epistemic gains from group decision procedures, with certain procedural qualifications (Pettit & List, 2011, pp. 82-103).

number of agents. We might call this practice a 'division of epistemic labour'. So, since this division of epistemic labour seems to be an established practice in modern society, doesn't that threaten my claim that our moral relations with the global poor are complex?

To respond, I will begin by saying that this is a plausible way of reducing the complexity of our moral relations with the poor. The issue though is to what degree a division of epistemic labour can reduce complexity. It is not clear to me that even after we implement such a policy, it would effectively remove the threat of complexity failure from our moral relations with the poor. One concern is that a division of epistemic labour only combats complexity in the form of uncertainty regarding a range of possibilities. Epistemic agents might be able to rely on authorities to reduce their uncertainty regarding policy questions, but they still need to be aware of which among the alternative policy approaches these authorities endorse.⁵³ Thus, there may still be the issue that we have numerous beliefs, for which there is a high degree of certainty, relevant to our moral relations with the global poor. As this element of complexity alone may well be enough to make the information content of our moral relations with the global poor quite large, then the threat of complexity remains.

Second, notice that a division of epistemic labour is not a zero information cost way of reducing complexity. There are a set of epistemic norms regarding authority, trust, and testimony that agents must believe within any society that adopts a division of epistemic labour. These norms are what allow such a policy to be operationally effective. For example, as a member of such a society, I am obliged to know who the experts are, why to

⁵³ This interpretation of a division of epistemic labour's complexity reducing qualities is a modest one. We might imagine agents relying on a division of epistemic labour not merely as saying 'I'll defer to the experts to inform my opinion' but rather something stronger such as 'I don't need to believe all these facts, that's the job of the experts'. This latter statement is problematic however, as it seems to be a divestment of one's obligation onto a sub-group of society (i.e. experts) where concerns remain about the possibility of epistemic failure for this sub-group.

trust them, and how they earn and maintain their authority.⁵⁴ This is a new sub-set of beliefs, relevant to our moral relations with the global poor that we need to have correct views regarding in order to realize the advantages of a division of epistemic labour. As norms, this new sub-set of beliefs is similar to our moral concepts in its contribution to complexity. In this way, an epistemic division of labour trades the complexity embodied in uncertainty with complexity as embodied in number of beliefs. Uncertainty regarding certain worldly beliefs is replaced with a set of beliefs that constitute the norms of a division of epistemic labour. To be sure, this trade off should represent a net advantage. As argued earlier, complexity as embodied in norms like our moral concepts is quantitatively lesser than complexity as embodied in worldly facts. Thus, trading the latter for the former should reduce overall complexity. But again, if complexity as embodied just in the *number* of beliefs relevant to our moral relations with global poor is sufficient to make those relations complex, then trading complexity as embodied in uncertainty regarding facts for complexity as embodied in a new set of norms will not help, as this expands rather than contracts the size of the set of beliefs in question.

Finally, there is the question of whether the majority of actual citizens take advantage of the division of epistemic labour in question, rather than ignoring its advantages in preference of their own heuristic based reasoning and belief justification processes. Many citizens trust their limited social reference group over the testimony of ‘experts’ precisely because they do not support, or have not considered, arguments that justify the role of these experts (See §6.5.3). Though the theoretical advantages of a division of epistemic labour are important to note, they are not relevant for my project of exploring the epistemic roots of our moral failure to fulfill our obligations to the global poor. My claim that the threat of

⁵⁴ Here, we also can point out the complicating factor that there might be reasonable disagreement about who the experts are. Given this worry, as epistemic agents we will need to take up the burden of information regarding how to adjudicate between ‘expert’ status claims.

complexity failure is real is made in regards to our current epistemic practices, not superior but unactualized epistemic practices.

To summarize this section, agents suffer from complexity failure when the amount of information embodied in their belief sets regarding moral problems becomes too large to manage. The information content of our beliefs sets regarding our moral relations with the global poor is large due to the large number of (high certainty) beliefs we need to hold in order to apprehend and satisfy these obligations, and also due to the degree of uncertainty we have regarding policy questions related to poverty reduction. Complexity failure shows that even when we have access to all of the relevant information, and treat this information as salient, there is still a threat of epistemic moral failure due to the massive amount of information embodied in our moral relations.

6.5 Interactions between the Three Mechanisms of Epistemic Moral Failure

I have presented three mechanisms of epistemic moral failure. For the most part, this was done independently to highlight the distinctness of these three mechanisms. But as I mentioned at times, the reality is that these mechanisms rarely operate independently. In this section, I will reiterate and expand on how these mechanisms of epistemic moral failure interact in a mutually reinforcing way whereby the effects of each mechanism act to reinforce the intensity of others. This creates a potent triple–threat to our fulfillment of our moral obligations to the global poor.

6.5.1 Up–take :: Transmission

How does up–take failure exacerbate transmission failure? When up–take failure is prevalent, there is no demand for far off information. Inasmuch as modern media are profit orientated, a lack of demand for far off information will result in a lack of supply of it (i.e.

transmission failure). Even when total transmission failure does not occur, psychological dispositions such as the identifiable victim preference (§6.2.2) also influence the kinds of information transmitted. Media outlets and NGO's are aware of these dispositions and seek to take advantage of them to increase the marketability of their information. This often comes at the expense of presenting poverty as an event rather than a process.

How does transmission failure exacerbate up-take failure? Research provides evidence that the way in which poverty is reported by media outlets affects attributions of causal responsibility for poverty:

Iyengar studied TV news broadcasts between 1981–1986 about domestic poverty in the USA, and delineated two major categories. One of them describing poverty primarily as a social or collective outcome (a thematic frame); the other describing poverty in terms of particular victims (an episodic frame). Generally, episodic frame news stories outnumbered thematic frame stories two to one. In an initial experimental study, the participants' perceived responsibility for poverty was significantly influenced by the way the media framed the story. Thematic stories evoked more structural (situational) attributions, and episodic frame stories evoked more individualistic ones. (Harper, 2003, pp. 191-192)

Thus, partial transmission failure that misrepresents the problem of poverty contributes to attributions of the causes of poverty that are hostile to agents properly apprehending their obligations of justice.

Up-take failure also makes an agent prone to discounting information that challenges their established beliefs. But some people in some instances will revise their beliefs in light of new evidence. Total transmission failure exacerbates up-take failure by removing the chances that such a prompt will occur at all, since new information never reaches the recipient. I cannot at all be expected to revise my beliefs when new evidence never reaches me. Furthermore, the prolonged experience of not being confronted with any information

that challenges my beliefs may well be followed with a faulty inference that there is no such evidence. Such an inference would further solidify my confidence in my established beliefs, and so reinforce my up-take failure.

6.5.2 Transmission :: Complexity

How does transmission failure exacerbate complexity failure? Recall that the complexity of our moral relations with the global poor increases in proportion to our uncertainty regarding the many alternative approaches to the combating the problem of poverty. This uncertainty is a strong function of the background evidence that an agent has. The less familiar I am with the body of evidence bearing on a certain policy question, the more uncertainty I have regarding which among a range of alternative policy choices is favorable, or correct.⁵⁵ Transmission failure exacerbates complexity failure because agents who suffer from transmission failure will be less familiar with the evidence relevant to their moral relations with the global poor. This will translate into higher uncertainty, and thus increased complexity in their belief sets regarding their obligations to the global poor.

How does complexity failure exacerbate transmission failure? As I claimed in §6.4.1, more complex moral problems are overflowing with information. But transmission mediums have a limited information transmission capacity. This is true in a purely technical sense (in the way that your internet connection has a fixed bandwidth measured in megabytes per second), but also in a pragmatic sense in that the average person only has so much time and patience to give in activities such as reading articles and watching news programs. This limited information transmission capacity pressures modern media infrastructure to present complex situations and subjects in a way that conforms to this capacity. Often this means presenting only a subset of the total relevant information.

⁵⁵ Assuming I form my belief in a way that is sensitive to the evidence. That is, in the way that the dogmatist does not.

Recipients of this subset of information will thus suffer from a partial transmission failure in that at least some of the relevant information does not reach them. This is well exemplified in the way that popular news coverage presents the problem of global poverty as a simplified event, rather than a complex process.

6.5.3 Up-take :: Complexity

How does up-take failure exacerbate complexity failure? Independently, complexity failure occurs when agents are overwhelmed by the amount of information relevant to their obligation to the extent that they are misinformed, ignorant of, or heavily and inappropriately discounting of at least some of this information. However, in some instances the agent might not even be aware of the complexity of their moral obligation. In such a case, they fail to appreciate the amount of information that bears on their obligation. This kind of situation represents an even greater threat of epistemic moral failure than the situation in which the agent *does* properly appreciate the complexity involved. It is one thing to appreciate complexity, and due to the difficulty of managing it – get something wrong. It is quite another to be oblivious to complexity, and so take no steps to manage it at all. The latter route involves a much higher risk of epistemic moral failure. As I pointed out earlier §6.4.3, an agent that suffers from up-take failure most likely does not appreciate the complexity of their moral relations with the global poor. I conjecture that up-take failure exacerbates complexity failure because we are psychologically disposed to create a simple and thus manageable model of our world. In modern times, however, this disposition is a disservice to us given the complexity of modern moral problems.

How does complexity failure exacerbate up-take failure? The large amount of information that confronts us in complex moral problems can often be overwhelming to the point that it causes anxiety for the agent trying to manage these moral problems. This is a problem for those agents that appreciate the complexity of their situation, and are wary of

the threat of epistemic moral failure that complexity gives rise to. Anxiety is not a comfortable psychological state, and prolonged feelings of anxiety are harmful. One escape from the harms of this complexity caused anxiety is ‘tuning out’ – convincing oneself (consciously or subconsciously) that the situation can be understood in simple terms. Of course, this does nothing to reduce the actual facts or evidence bearing on the situation, only the agents felt response to that complexity. So agents seeking relief from complexity anxiety need a mechanism by which to reinforce their simplistic assessment of the problem, and psychological mechanisms such as confirmation bias and groupish thinking §6.2 provide just this function. These mechanisms to remedy the anxiety of complexity are advantageous in the sense that they are readily available and subconsciously implemented, rather than something the agent must expend intentional cognitive effort to create and maintain.

To summarize this chapter, in order to avoid epistemic moral failure of our obligations to the global poor, we require information pertinent to the fulfillment of those obligations. But we face three threats regarding the proper flow of this information that operate concurrently. First, there is a large amount of this information (complexity). Second, the modes of transmission of this information are not well developed. Third, there are barriers to the reception of this information at the individual agent level (up-take). At each of these levels, there is a risk that information pertinent to the fulfillment of our obligations is lost, and the overall risk is multiplied by the influence of a similar risk of information loss at each other level.

7. Epistemic Failure – Is There A Way Forward?

I claimed in §5.1 that we often hurriedly ask ‘How can we remedy our moral failures?’ before we ask the crucial question ‘Why do we fail?’ Now that I have presented an account of the plausibility of our epistemic moral failures toward the global poor, I will revisit the question of how we remedy these failures.

How can we avoid moral failure toward the global poor in the future? Given the plausibility of the view that we fail epistemically in our obligations of justice to the global poor, two quick responses that purport to be all that is needed to remedy our moral failures toward the global poor are revealed as inadequate. I will address each in turn.

1. We must ensure that we *care* more about the plight of the poor.

This response is inadequate in that it frames our moral failures toward the global poor as purely motivational. The epistemic account of moral failure provides a plausible account of our moral failures that does not rely on motivational assessments of the agents involved. Once again, I do not take motivational considerations to be unnecessary or irrelevant in an explanation of our moral failures toward the global poor – but I also do not take motivational considerations to be the obvious and complete explanation our moral failures. As such, I also do not take motivational changes to be sufficient to remedy our moral failures. Even with the best of intentions, we can still fail in our moral obligations.

2. We must ensure that we form our beliefs about our obligations to the global poor in accordance with the evidence.

On this response, we are each individually charged to ‘be rational’ in our beliefs regarding our obligations. But irrational tendencies such as cognitive biases are not the woeful character traits of the few cognitively vicious among us. They are the *norm* for human beings in general. This response also ignores the possibility that it might not be

best to aim to *overcome* our psychological proclivities by becoming exemplars of rationality, but instead *harness* them in pragmatic ways toward the goal of fulfilling our obligations (Lichtenberg, 2013, p. 117). Finally, this response does not sufficiently address two threats of epistemic moral failure that operate even when individual agents form their beliefs in accordance with the evidence available to them. These are the threats that i) some of the evidence bearing on the situation doesn't reach these agents (transmission failure), and ii) that the body of evidence is so vast that it is unreasonable to demand that agents can manage it without some errors (complexity failure). These flaws in the flow of information are not problems that can be solved by the individual alone, but only through cooperative action.

7.1 A Pessimistic Objection

Our question remains: How can we avoid moral failure toward the global poor in the future? Focusing on epistemic moral failure, consider this pessimistic reply: we *cannot* avoid epistemic moral failure toward the global poor in the future. According to this reply, the structural flaws in the flow of information within global society cannot be repaired, or restricted, to guard against epistemic moral failure, and so this threat will always remain. In what follows, I will develop an important objection to my line of argument that originates from this reply. After doing so, I will present my case that we should in fact be optimistic that there is a way to avoid epistemic moral failure.

This reply gives rise to an important objection to my line of argument so far. The objection proceeds in three stages. First, advance the pessimistic reply: (i) we cannot do anything to remedy the threat of epistemic failure in our obligations of justice to the global poor. The plausibility of this premise seems to borrow directly from my account of the plausibility of the threat of epistemic moral failure, especially in light of how the different

mechanisms of moral failure reinforce one another. Because the threat of epistemic moral failure is so embedded in our psychology, our information infrastructure, and in the complex reality of our moral relations, the prospects of our overcoming this threat are slim. Second, appeal to a popular principle in moral philosophy: (ii) ‘ought implies can’. Most famously espoused by Immanuel Kant, ‘ought implies can’ has been elaborated by contemporary authors such as Peter Vranas (2007). Why think it is plausible? For Vranas, to say an agent ‘can’ perform an action is to say that that agent has the ability and opportunity to perform that action. In this context we are not concerned with a broadly logical notion of ‘can’, but rather a psycho–physical notion. Vranas argues that proper attention to the very notion of an obligation reveals that candidate obligations require that an agent have access to alternative possibilities for those actions. So the objection has two premises (so far):

P 1: We cannot do anything to remedy the threat of epistemic failure in our obligations of justice to the global poor.

P 2: ‘ought implies can’

The conclusion that follows from these premises is that:

C 1: It is not the case that we ought to do anything to remedy the threat of epistemic failure in our obligations of justice to the global poor.

Finally, a third premise is added that points out that (iii) a lack of an obligation to remedy our epistemic moral failures is effectively the dismissal of those obligations. It seems that not being obligated to undertake any measures to secure the fulfillment of an obligation is effectively the same as having no such obligation; so then:

P 3: If it is not the case that we ought to do anything to remedy the threat of epistemic moral failure in our obligations of justice to the global poor, then it is not the case that we have obligations to the global poor.

From C1 and P3 it follows that:

C 2: It is not the case that we have obligations to the global poor.

This is an objection, like those entertained in §4.2–4.3, that we do not fail in our obligations of justice to the global poor, because we have no such obligations. So then the pessimistic reply to the question ‘How do we remedy our failure?’ seems to lead to the rejection of obligations to the global poor.

Is this line of argument plausible? I do not think it is. Regarding P3, I do not see why it follows from the claim that it is not the case that we ought to guard against the threat of epistemic moral failure, that we have no obligations to the global poor. In §3, I presented a broad range of moral thinking about justice that supports a set of minimal obligations to the global poor. We can view this reasoning as having established a *prima facie* case for these obligations, and P3 as presenting a possible defeater to this reasoning. Now recall the Prospective View of obligation (§4.4.2). On this view, we are obligated to do what is most likely to fulfill our obligations. Even if there is a considerable threat of epistemic failure of our obligation that we cannot overcome, we are still obligated to do what is most likely to fulfill these obligations. Clearly, among the alternative courses of action, forming the belief that you are in fact not obligated to fulfill our obligation is not the most likely course of action to fulfill your obligation. Rather, in the face of considerable threat of epistemic moral failure, one still ought to at least *attempt* to fulfill their obligations to the poor. Often, these attempts will be foiled when the agent suffers from the various mechanisms of failure I have outlined, but the course of action that involves at least attempting to fulfill these obligations is superior, on the Prospective View, to forming the belief that one has no such obligations. Even if one does not endorse the Prospective View, the lesson here is that when the threat of moral failure is lively, the best course of action is not to give up on our obligations, but to learn to accept that often, despite our best efforts,

we will still fail in our obligations. Instead of abandoning what we have good reason to think our obligations are, why not incorporate into the idea of what it is to be a reasonably diligent moral agent that one will often fail epistemically in their obligations?

Next, consider P1. Does the plausibility of my account of epistemic moral failure in fact imply that we *cannot* overcome this type of failure? Notice that in order for the argument to go through, P1 must establish no less than the impossibility of our overcoming epistemic moral failure. It is not enough that it is improbable, or even *extremely* improbable that we overcome epistemic moral failure – it must be *impossible*. This is because in ‘ought implies can’, the ‘can’ denotes possibility, not probability. Noticing this, it is now clear that my account of the plausibility of epistemic moral failure is insufficient to secure P1, since that account did not aim to establish a *guarantee* that we will fail epistemically in our obligations, but rather aimed to establish that it is likely that many of us fail epistemically in our obligations. Thus, my account of the plausibility of epistemic moral failure might support the claim that it is improbable, or even extremely improbable that we overcome the threat of this type of moral failure, but it does not support the claim that it is impossible that we do so – as is required for the argument to go through. In fact, I think it is very much possible to make progress in overcoming the threat of epistemic moral failure.

7.2 An Optimistic Response

I am optimistic that we *can* overcome the threat of epistemic moral failure, or at least make considerable progress in reducing that threat. To share my optimism, I will briefly detail three remedies to this threat that I think hold promise. While I believe that each of these remedies is alone insufficient to overcome the threat of epistemic moral failure, combined, they may allow us to greatly reduce its prevalence.

Augmentation: I have already detailed how human beings can extend their basic information gathering abilities using language, memory and most importantly technology. Great progress has been made in this regard in the modern era. We have access to more information than any other human generation before us, information that we need to inform our obligations. Further advances in cheap, accessible, and open communication technology might help overcome our information deficit. We might also be able to augment *ourselves*, helping overcome or subdue our psychological barriers to proper concern for the poor, and allowing us to better deal with complexity through cognitive enhancement.

Integration: In addition to focusing on enhancing our information gathering and processing abilities, we can also be mindful of how the many formal and informal institutions affect the flow of information relevant to our obligations, especially experiential information (§6.3.2). Taking lessons from Elizabeth Anderson's important work on integration, we might ask how we could restructure global interactions to promote greater integration of global society. Policies regarding immigration and multiculturalism could be tailored to promote global citizenship, and greater social and cultural interconnectedness.

Simplicity: Our moral relations with the global poor are complex, but is this complexity a brute and unchangeable fact? If the institutional choices that we make contribute to the complexity of our moral relations with the global poor, then we could combat complexity by restructuring some of our global relations. If we acknowledge the threat that complexity poses to our obligations of justice, then we can begin to acknowledge the benefit that simplicity offers to the same. Finding ways to reduce the number of beliefs relevant to our obligations, and the uncertainty regarding our policy choices, would reduce the burden of information embodied in our moral relations with the global poor. We could also further advance the idea of an epistemic division of labour, which I admitted in §6.4.4 has positive prospects for reducing the threat of complexity failure.

All of these remedies are unrefined, and concerns remain regarding their mutual compatibility. I present them here only as candidate solutions in the hope that it convinces the reader that there are at least some approaches available that could restructure the flow of information within global society as to guard against the threat of epistemic moral failure. In short, I am optimistic that there is a way forward.

Conclusion

Summary

Why do we fail in our obligations of justice to the global poor? I have suggested that there are structural flaws in the flow of information pertinent to these obligations within modern global society, and that this leads to epistemic moral failure of these obligations to the global poor. There is evidence to support this assessment. First, research from social psychology supports the view that agents have entrenched beliefs hostile to their obligations to the global poor, while research from moral psychology has found our moral judgments exhibit biases against far off, unidentifiable out-group members. Second, media researchers have found biases against the presentation of information regarding the global poor, and of the information that is presented, much is distorting and incomplete. Finally, the information content of our moral relations with the poor is arguably incredibly large, and therefore difficult to manage even for the diligent epistemic agent.

Having developed the aforementioned response to my central question, I briefly considered another: *How can we avoid moral failure toward the global poor in the future?* I argued against two simple answers to this complex question, and responded to a pessimistic stance regarding the prospects for avoiding moral failure by showing how and why we should be optimistic about the prospects of combating epistemic moral failure.

Proper Information Flow as Imperative of Global Justice

We have obligations of justice to the global poor (§3.1). But in order to fulfill these obligations, we need to guard against the threat of epistemic moral failure (§6). This involves ensuring that the information flow within society is structured in such a way as to

avoid, or minimize, the prevalence of the mechanisms of epistemic moral failure. This is a task of institutional design regarding the flow of information.

Our failures toward the global poor can thus be generalized as a failure to place enough emphasis on the creation and maintenance of institutions that aim to ensure the flow of information within global society is conducive to the fulfillment of our obligations of justice. It has been said that we live in the 'information age'. In this age, we have embraced relations with each other, and with the global poor (i.e. globalization), that significantly increase the amount of information pertinent to our obligations. Sadly, we have failed to invest in institutions that properly manage the flow of this information toward the goal of justice.

Many challenging questions remain as to what exactly institutions that properly manage the flow of information would look like. I do not think that the answers to these questions of information flow are as simple as some straightforward application of well-established political thought. This is a relatively new political question, brought to the forefront by the information age. That said, I remain optimistic that progress can be made in combating epistemic moral failure. I would like to be able to say more regarding the path forward, but the questions are complex enough, and the remaining space limited enough that I can only say that the first step in designing institutions that avoid epistemic moral failure must be to properly understand the nature of this failure. I hope that this work has contributed to such an understanding.

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Appendix A

Calculations of information embodied in Figure 6–5, Figure 6–7, Figure 6–8

$$I(\text{Figure 6–5}) = p_p \log_2(1/p_p) + p_q \log_2(1/p_q) = 0.6 (0.737) + 0.4 (1.32) = 0.97 \text{ bits}$$

$$I(\text{Figure 6–7}) = p_p \log_2(1/p_p) + p_q \log_2(1/p_q) + p_r \log_2(1/p_r) = 0.6 (0.737) + 0.2 (2.32) + 0.2 (2.32) = 1.37 \text{ bits}$$

$$I(\text{Figure 6–8}) = p_p \log_2(1/p_p) + p_q \log_2(1/p_q) + p_r \log_2(1/p_r) = 0.33 (1.59) + 0.33 (1.59) + 0.33 (1.59) = 4.76 \text{ bits}$$

Probability of a false belief in a large set of beliefs with equally high certainty

Take an (independent⁵⁶) belief set of size n for which the degree of certainty for each belief (p_T) is equally high. The probability that at least one belief in this set will be incorrect ($p_{F \geq 1}$) is given by the formula⁵⁷:

$$p_{F \geq 1} = 1 - p_T^n$$

That is, we calculate the probability that all beliefs in the set are correct, and then calculate the complement of this situation (the case where not all the beliefs are correct – i.e. at least one is incorrect) by subtracting the result from 1. For example, for a set of 10 beliefs for which I have 90% certainty regarding each belief, the probability that at least one belief is incorrect is:

⁵⁶ The beliefs are independent in the sense that the probability of the truth or falsity of each belief is not affected by the truth or falsity of any other.

⁵⁷ Equation 6.2 in (Ross, 2014, p. 127)

$$p_{F \geq 1} = 1 - p_T^n = 1 - 0.9^{10} = 1 - 0.347 = 0.651 = 65.1\%$$

Thus, the probability of a false belief increases with the total number of beliefs in the set, and with the degree of uncertainty regarding each belief.

Probability of forming a false belief from among a range of alternative possibilities with varying probability

Assuming that the agent prefers the alternative with the highest probability, the probability of forming a false belief is given by the formula:

$$p_F = 1 - p_H$$

Where p_H is the probability of the preferred alternative. The probability of forming a false belief is just the probability that any of the other alternatives is true, rather than the preferred alternative. Thus, the probability of forming a false belief in this situation scales with the probability value of the highest probability alternative. This probability, in turn, increases with 1) the number of alternatives and 2) the uniformity of the probability among these alternatives. Regarding (1), each new alternative added must be assigned some non-zero probability, and thus takes away from the maximum probability of the preferred alternative, since the total probability distribution must sum to 1 (Ross, 2014, pp. 26, Axiom 2). Regarding (2) the more uniform the probabilities are distributed, the lower the probability of the preferred alternative, again, because the total probability distribution must sum to 1.