

## Cooperation and Assistance in the Great Society: Adam Smith's *Oikeiōsis* Revisited

### Abstract

Adam Smith's classical liberal champions have long insisted that his *Theory of Moral Sentiments* (*TMS*) and *Wealth of Nations* (*WN*) address cooperation in different spheres of life: the realm of personal exchange in which agents possess detailed knowledge of one another's interests and circumstances (*TMS*) and the realm of impersonal exchange in which agents possess only abstract knowledge of others in the form of market price and profit/loss signals (*WN*). This paper argues that the "two worlds" interpretation of Smith's *oeuvre* obscures the analytic symmetry between *TMS* and *WN* as theories of social-economic order and thus falsely reduces Smith's economics to "commerce only."

To foreground the economic character of *TMS*, the author re-interprets it as a theory of non-commercial social-economic order in which extensive cooperation is generated by twin engines of specialization and trade analogous to those Smith theorizes in *WN*. Smith never speaks of specialization per se; yet in both of his major works, he highlights each individual's freedom to direct his "principal attention" to "that particular portion of [the great society] which [is] most within the sphere both of his abilities and of his understanding" (*TMS* VI.ii.2.4), i.e., to claim his place within the social network of specialized knowledge, labor, and responsibility. Motivationally, Smith assumes that specialization is driven by perceived advantage but does not reduce advantage to pecuniary gain. Rather, he speaks of our human "desire of bettering our condition" along multiple dimensions of betterment: wealth, status, consciousness of deserved reward, and the *eudaimonic* happiness he and the Stoics associate with achievement of moral virtue (Brown 1994).

A major argument of this paper is that Smith's notion of specialization derives in part from the Stoic concept of *oikeiōsis* (Forman 2010; Montes 2008; Brown 1994), commonly translated as "appropriation or ownership" (Montes 2004, 89). In the context of Smithian specialization, *oikeiōsis* refers to the enactment of ownership over one's personal domain. The personal domain for Smith is not a physical space like the Aristotelian *oikos* but a moral space; and Smith renders moral distance spatially complex through his analysis of sympathy and beneficence, showing how the social lives of ordinary persons give rise to varying degrees of familiarity with and informal duties to others, many of whom are only 'known' to us as members of communities with which we identify or affiliate (Forman 2010; Offer 1997). The term *oikeiōsis* underscores Smith's distinctive emphasis on the spatial open-endedness of the Smithian *oikos*, what he terms the "humble department" (*TMS* VI.ii.3.6). For *oikeiōsis* entails not just "taking care of one's own" but continually reassessing and redefining "one's own," i.e., the moral and commercial objects within one's sphere of concern and influence for which s/he bears some degree of responsibility.

Trade too is defined broadly by Smith as conversation, not just monetary exchange. In the great society where every man "lives by exchanging," members' actions are coordinated through ongoing dialogues with *abstract* others, as commercial market processes and Smithian impartial spectator procedures convey knowledge of normal prices or moral/ethical norms and feedback on individuals' actions in light of these norms, all filtered through the perceptions and judgments of individual actors. In *TMS* and *WN* jointly, Smith thus provides a conceptual framework for understanding the great society of mankind as a commercial and non-commercial economy of social cooperation, a "common centre of mutual good offices" (*TMS* II.ii.3.1).

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### Introduction

Adam Smith's *Theory of Moral Sentiments* (*TMS*) and *Wealth of Nations* (*WN*) jointly address the problem of extensive social cooperation, the fact that each member "stands at all times in need of the cooperation and assistance of great multitudes, while his whole life is scarce sufficient to gain the friendship of a few persons" (*WN* I.ii.2: 26; also *TMS* II.ii.3.1: 85). Yet Smith's classical liberal champions (Viner 1972; Coase 1976; Hayek 1978; Boettke 2012; Roberts 2014) have long insisted that *TMS* and *WN* address "two very different spheres of life" (Roberts 2014: 229), two epistemically, institutionally, and ethically distinct forms of cooperation (Viner 1972: 82). They read *WN* as a theory of market-based "cooperation with strangers" (Boettke 2012: 6) and *TMS* as "a book about the people closest to us" (Roberts 2014: 226), a theory of small-scale cooperation within the "realm of the familiar" (Boettke 2012: 6) where "members know one another well" (Heyne 2008: 6).

On this popular interpretation, Adam Smith was a moral localist and economic cosmopolitan, wary of exhortations to "extend our care and concern to distant strangers whom we have little contact with, little knowledge of and little capacity to help" (Forman 2014: 291) while keen to recommend commerce as a means of communicating distant others' needs and desires in the actionable form of market prices, profits, and losses. By merely responding to these impersonal signals, individual buyers and sellers can effectively "confer benefits beyond the range of [their] concrete knowledge" and thus provide "a greater benefit to the community than most direct 'altruistic' action" (Hayek 1988: 81 and 19).

Defenders of this "separate spheres" reading of *TMS* and *WN* trace it to Smith's emphasis on the spatial limits of human knowledge and affection (Viner 1972: 80-81; Coase 1976: 533-535), memorably expressed in his statement that

Every man, as the Stoics used to say, is first and principally recommended to his own care . . . After himself, the members of his own family, those who usually live in the same house with him, his parents, his children, his brothers and sisters, are naturally the objects of his warmest affections. They are naturally and usually the persons upon whose happiness or misery his conduct must have the greatest influence. He is more habituated to sympathize with them. He knows better how everything is likely to affect them, and his sympathy with them is more precise and determinate, than it can be with the greater part of other people (*TMS* VI.ii.1.1-2: 219).

Smith here affirms the Stoic concept of *oikeiōsis*, specifically the notion that "human affection and care are ordered spatially around the self in a concentric pattern" (Forman 2010: 8). The

term *oikeiōsis* never appears in Smith's published works and has received relatively little attention from Smith scholars (Brown 1994; Montes 2004; Forman 2010). Yet the influence of Stoicism on Scottish Enlightenment thinkers generally and Smith's active use of Stoic texts in his own library suggest that he was versed in their varied definitions and discussions of the *oikeiōsis* concept (Montes 2008).

In this essay, I suggest an alternative reading of Smith's moral philosophy in which *WN* and *TMS* are understood as coextensive contributions to a single social science of human cooperation. Smith's overarching project, as I perceive it, was to theorize the great society of mankind (*TMS* VI.ii.2.4: 229) as a web of "voluntary collaboration" (Hayek 1948: 23) – a commercial and non-commercial economy of good offices – through which each member can potentially obtain "the cooperation and assistance of great multitudes" while simultaneously being "induced, by his own choice and from the motives which [determine] his ordinary conduct, to contribute as much as possible to the need of all others" (Hayek 1948: 12-13). To this broader end, I seek to illuminate the non-commercial dimensions of Smithian economics by disentangling them from the separate spheres ontology – the personal/impersonal, taxis/cosmos grid – through which *TMS* and *WN* are still predominantly understood.

Major threads of my argument are already established in the Smithian literature. I have been inspired by the integrative *TMS/WN* interpretations of Boulding ([1965] 1974, 1969, 1970), McCloskey (2006, 2010), Montes (2004, 2008), Bowles and Gintis (2011), and Smith (2012, 2013), and am particularly indebted to Otteson's articulation of deep symmetries between *WN*'s commercial marketplace *TMS*'s "marketplace of morals" as engines of emergent social order (Otteson 2002) and to Forman's expansive analysis of moral proximity in Smith (Forman 2010). My approach diverges from Otteson's and Forman's, however, on three major points.

First, I argue that the feedback mechanisms in Smith's theories of commercial and noncommercial exchange are epistemically symmetric in that the Smithian market process and impartial spectator procedure generate social knowledge of the same kind, viz., knowledge of prevailing social norms and positive/negative feedback on one's actions in light of these norms, all filtered through the perceptions and judgments of individual actors (Chamlee-Wright 2004). Extensive social cooperation is facilitated in each case by knowledge surrogates (Horwitz 2004): stand-ins for detailed, on-the-ground knowledge of distant others. This argument undercuts the "familiarity principle" Otteson ascribes to Smith (Otteson 2002: 4), according to which Smith's arguments are marked by an epistemic asymmetry: direct, concrete knowledge of others' "circumstances, passions, and interests" (i.e., real familiarity) vs. indirect, abstract knowledge of others (i.e., notional familiarity) as the basis for cooperative action in *TMS* and *WN*, respectively.

Second, I question Forman's classification of Smith as a moral localist whose "overriding assertion was that our affections were driven most powerfully by our habits [of] sympathizing with those nearest us in the *oikos*," persons with whom we "literally share physical space" (Forman 2010: 126 and 8). As Forman's own analysis reveals, moral distance for Smith "was not merely a physical concept" (*ibid.*: 5). Smithian moral distance is a function of sympathy,

understood not as “other-regarding affections which weaken or intensify depending on the physical proximity of another” but as “a principle of judgment and was impacted in very complex ways by the cultural, affective, and physical proximity of the person or object being judged” (*ibid.*: 6; also Otteson 2002: 184). Hence the *TMS* humble department – individuals taking care of their own – is not just administrative stewardship or *oikonomía* (Heyne 1998: 400). It also includes *oikeiōsis* in the broad sense of “appropriation or ownership” (Montes 2004: 89), i.e., the process of *determining* “one’s own,” the moral objects within one’s domain of concern and influence for which one chooses to bear some degree of responsibility. Smith’s “humble department” is thus analogous to what modern economic readers of *WN* call specialization: establishing one’s place within the economy of fellows, the liberty to determine which good offices one will provide to society. On my reading, the generative core of extensive social cooperation in Smith’s moral philosophy is not exchange alone but the twin engines of ownership (*oikeiōsis*) and exchange – a.k.a. specialization and trade – in both commercial and non-commercial forms.

Third, I argue that *TMS* sets forth an economic theory on par with *WN*, not just a marketplace model of how “general rules of just conduct” emerge and evolve (Boettke 2012: 7; Otteson 2002) but a theory of non-commercial cooperation and assistance on an extended scale. Smith’s *TMS* distinction between formal duties of commutative justice and the informal duties of “proper beneficence” (*TMS* VII.ii.1.10: 270) leads many readers to overlook his discussion of informal duties because of their presumptively negligible social impact and because micro-cooperation within the “realm of familiars” is ostensibly disconnected from the market tests and feedback loops of the economy proper. As I read it, however, Smith’s *TMS* analysis heralds the *strength* of weak duties, the paradoxical fact that “the sum of negligible forces need not be negligible” (Roberts 2014: 179), and provides a conceptual framework for understanding how “those imperfect but attainable virtues” which occupy the bulk of Smith’s attention in *TMS* (Montes 2008: 46; Forman 2010: 130) can generate informal duties of care (Forman 2010: 226-227) and economically significant webs of non-commercial provisioning comparable to and deeply intertwined with the commercial provision of good offices.

To support these unconventional claims, I first enumerate six textual markers in *TMS* and *WN* suggesting that the two books share a single object of analysis. I then outline what I understand to be Smith’s theory of non-commercial benefaction in *TMS*, focusing on the imaginative process of sympathy through which individuals forge various degrees of familiarity with others and the associated matrix of informal duties that arise as certain roles and responsibilities become part of who we are and what we do within our respective humble departments. A fresh reading of Smith’s “Empire of China” parable shows it to be a rich microcosm of Smith’s larger theory of sympathy, virtue, and duty. In all, I find in *TMS* a systematic account of complex cooperation and human flourishing – including humanomic incentives, feedback loops, and potential growth of human cooperative capacities – on par with Smith’s analysis of commercial order in *WN*.

With regard to *oikeiōsis*, I argue that Smith affirms and extends the Stoic doctrine by recasting moral proximity and duty as emergent phenomena, not predetermined by blood or geographic

proximity (Lewis 2011). Though Forman and Otteson each acknowledge the “spatial complexities” of Smith’s thought (Forman 2010: 139-141; Otteson 2002: 184), they cast them as digressions from an overarching localism. I propose, alternatively, that the anti-physicalist thrust of Smith’s *TMS* theory of sympathy and informal duty constitutes an immanent critique of the localist premise that shared physical space imparts an intrinsic familiarity, a critique that recalls Smith’s anti-physicalist critique of mercantilism in *WN*. Just as Smith rejects the idea that certain physical properties confer intrinsic value to commercial objects, so too he rejects the notion that physical proximity confers intrinsic value to moral objects. By rereading Smith’s *oeuvre* in the light of these underappreciated congruities between *TMS* and *WN*, we can begin to see new possibilities for the nature and scope of Smithian humanomics (McCloskey 2011; Smith 2012).

### **The single object of Smith’s moral philosophy**

The notion that “the extended order of human cooperation” (Hayek 1988: 6) is the common object of Smith’s two great published works is supported by six parallel or overlapping elements in *TMS* and *WN*. First, Smith poses in both books the fundamental problem of extensive social cooperation, the fact that “[a]ll the members of human society stand in need of each others assistance” (*TMS* II.ii.3.1:85; also *WN* I.ii.2: 26). Second, Smith posits in *TMS* and again in *WN* a common human “desire of bettering our condition” (*WN* II.iii.28; *TMS* I.iii.2.i); and implies though he nowhere states it explicitly a broad notion of “betterment,” including “a moral kind that involves improving our character and has nothing to do with acquiring material goods” (Fleischacker 2004: 63; see also Macfie and Raphael 1984: 9; Heyne 1998: 59-63; Griswold 1999: 130-136; and Otteson 2002: 196-197).

Third, Smith in *WN* and *TMS* assumes that the quest for human betterment in the great society begins with specialization: discovering one’s place within the economy of fellows. As Smith colorfully describes it:

A savage who supports himself by hunting, having made some more arrows than he had occasion for, gives them in a present to some of his companions, who in return give him some of the venison they have caught; and he at last finding that by making arrows and giving them to his neighbour, as he happens to make them better than ordinary, he can get more venison than by his own hunting, he lays it aside unless it be for his diversion, and becomes an arrow-maker (*LJA* vi.46:348).

While obviously shaped by relative prices, the process of commercial specialization – becoming an arrow-maker in this case – is also a matter of identity and audience: What persona will I claim on the social stage? What genius or talent do I have that others might value? What is my gift? Whom shall I serve? As argued below, Smith’s *TMS* describes an analogous process of non-commercial specialization in its analysis of how individuals allot their limited powers of beneficence: how each individual comes to direct his “principal attention” to “that particular portion of [the great society of mankind] which [is] most within the sphere both of his abilities and of his understanding” (*TMS* VI.ii.2.4). In Stoic terms, specialization entails *oikeiōsis*: “appropriation or ownership” (Montes 2004: 89), not just in a legal sense but also ethical possession, the assumption of responsibility for one’s domain including informal duties of care.

Intimately intertwined with *oikeiōsis* or specialization is a fourth common element: exchange. Smith's *TMS* and *WN* each posit exchange as a fundamental process of social learning and adjustment. Exchange is not just monetary trade for Smith; it is bargaining and reciprocity, broadly defined. Smith traces the human propensity to "truck, barter, and exchange" to our "faculties of reason and speech" (*WN* I.ii.2:25) and ultimately to "the principle in the human mind on which this disposition of trucking is founded . . . the natural inclination every one has to persuade" (*LJA* vi.56:352). Persuasion or "bartering," Smith argues, is "the practise of every man in the most ordinary affairs" (*ibid.*). His broad notion of barter as "the constant employment or trade of every man" clearly includes the sympathetic exchange theorized in *TMS* wherein individuals engage in approbation-seeking dialogue with real and imagined spectators (Otteson 2002). Smith's everyman, the constant bargainer, asks the same question of the market that he asks of his conscience, namely: What are my good offices worth in the eyes of others?

A fifth confluence between *TMS* and *WN* lies in Smith's use of the term "mutual good offices" in both books to describe the fruits of social cooperation. Smith speaks in *WN* of a "common stock" of mutual assistance generated by networks of specialization and trade, wherefrom "every man may purchase whatever part of the produce of other men's talents he has occasion for" (*WN* I.ii.5:30); in *TMS* he speaks of a "common centre of mutual good offices" afforded from love, gratitude, friendship, and esteem (*TMS* II.ii.3.1:85). These parallel statements designate "mutual good offices" as Smith's general concept of benefaction and underscore a major premise linking his analyses of commercial and noncommercial exchange, namely: without "the power or disposition to barter and exchange," the diverse goals, labors, sympathies, and duties of individuals "cannot be brought into a common stock, and do not in the least contribute to the better accommodation and conveniency of the species" (*WN* I.ii.5:30).

A final marker of Smith's unified project lies in his pregnant juxtaposition of a "flourishing and happy society" in which "the necessary assistance is reciprocally afforded from love, from gratitude, from friendship, and esteem" and a "mercenary society" in which cooperation is secured "as among different merchants, from a sense of [their] utility, without any mutual love or affection . . . a mercenary exchange of good offices according to an agreed valuation" (*TMS* II.ii.3.2:86). Parallel to Smith's distinction between ordinary and superior prudence (*TMS* VI.i.15:216), his contrast between mercenary and beneficent societies calls attention to the virtues of the muddy middle, the space occupied not by Stoic sages or licentious brutes but by ordinary persons. In both instances, Smith recognizes the multiple virtues present in every form of human action (McCloskey 2006: 352-360) and that the ends of human happiness and flourishing are better served in societies that do not merely "subsist" based on the "mercenary exchange of good offices" (*TMS* II.ii.3.1-2: 85-86; see also Otteson 2002: 140 and Hanley 2009: 194-195). Together, these six items provide elements of a conceptual architecture within which to revisit the commercial and noncommercial generators of the "common centre of mutual good offices" – the economy of social cooperation – Adam Smith theorizes in *TMS* and *WN*.

### **Catallactic sympathy**

Exchange is a linchpin of complex collaboration for Smith. He envisages a great society in which persuasion is “the constant employment or trade of every man” (*LJA* vi.56:352), where “every man lives by exchanging” (*WN* I.iv.1:37). Yet even Otteson (2002) and other Smith scholars who recognize the *institutional* symmetry between Smith’s postulated mechanisms of commercial and non-commercial coordination in *WN* and *TMS* have yet to acknowledge the depth and significance of the *epistemic* parallels between them.

Throughout *TMS*, Smith foregrounds the very knowledge problems Hayek discerns in *WN* (Hayek 1948: 6-9) and the feedback mechanisms whereby individuals learn to cooperate more effectively with distant others in the absence of direct, detailed knowledge of their needs and difficulties. In the opening pages of *TMS*, Smith asserts that every human effort to understand or assist others is impaired by our inability to directly know what it’s like to be someone else (Otteson 2002: 5). Since “we have no immediate experience of what other men feel,” our senses cannot “carry us beyond our own person” (9). For Smith, the key to overcoming our epistemic isolation is sympathy, defined as “fellow-feeling with any passion whatever” (*TMS* I.i.1.5:10) and where “fellow” connotes an ethical or sociological sense of equality with others (Peart and Levy 2005).

To sympathize is to render an affirmative judgment on the propriety or the merits of the motives and conduct we observe in others and in ourselves. Smithian sympathy thus involves imagination, persuasion, and judgment. To render such judgments, one must perform an “imaginary change of situation,” to imagine “what we ourselves should feel in the like situation” (*TMS* I.i.4.6: 21 and I.i.1.2: 9). To acquire sympathy, we must likewise persuade others to render a positive judgment of our case. Sympathetic exchange between actor (demander) and spectator (supplier) becomes a bargaining process. When a person is unable to obtain the sympathy she seeks, she can modify her proposal until she and the spectator strike a mutually agreeable “concord” (*TMS* I.1.4.8:22). As actors and spectators imagine how their situations will appear to others, all parties gain valuable knowledge and enhanced capacities for obtaining and providing sympathy in the future.

Bilateral, actor-spectator exchange is not Smith’s principal object in *TMS*, however. Just as his analysis of commercial exchange in *WN* builds from two-person barter to a multilateral marketplace, Smith’s ultimate focus in *TMS* is the impersonal form of sympathetic exchange in which actors seek the approbation of a notional third party, an “impartial spectator” (*TMS* I.1.5.4:24). The impartial spectator serves as each actor’s “socialized conscience” (Forman 2010: 16), issuing positive and negative feedback on the actor’s conduct in accord with evolved social rules and norms. Like market prices, prevailing norms of propriety and merit tell actors how their conduct is likely to be seen and judged by society at large. Individuals then act, pursuing what each perceives to be the most advantageous course of action (Chamlee-Wright 2004). Social rules and norms are further analogous to prices inasmuch as they are subject to ceaseless pressures for change as a result of individuals’ judgments of “what, in particular instances, our moral faculties, our natural sense of merit and propriety, approve, or disapprove of” (*TMS* III.4.8:159; see also Weinstein 2013: 268).

The sympathetic process Smith theorizes in *TMS* is aptly described as catallactic: a decentralized process of emergent coordination that “serves the multiplicity of separate and incommensurable ends of all its separate members” (Hayek 1976: 108). Evolved rules and norms serve as knowledge surrogates, nudging individuals toward mutually beneficial compromises between their interests and the interests of others (*TMS* III.3.1:134) despite actors’ ignorance of others’ personal circumstances. Through ongoing dialogue between oneself and one’s culturally imbued conscience, each person acquires the ability to “[view] himself in the light in which he is conscious that others will view him” and to “humble the arrogance of his self-love,” and to “bring it down to something which other men can go along with” (*TMS* II.ii.2.2:83). Smith’s sympathetic process is also catallactic in a second Hayekian sense: as an integrative process that cultivates familiarity and fellowship among erstwhile strangers (Hayek 1988: 112). On both accounts, Smith’s *TMS* can be understood as an economic treatise in its own right, outlining principles and processes of non-commercial cooperation, complementary to yet conceptually distinct from the commercial processes he outlines in *WN*.

### **Informal duties beyond the intimate sphere**

In seeking to understand the logic and scope of Smith’s *TMS* as a theory of voluntary cooperation and assistance among non-intimates, a crucial question becomes: What senses of fellowship and duty might impel individuals to extend such assistance, and what forms of knowledge or knowledge surrogates might support their efforts?

Smith addresses these very questions in his well-known “Empire of China” parable (*TMS* III.3.4:136-137). The story unfolds in two stages, the first of which Smith frames as follows:

Let us suppose that the great empire of China, with all its myriads of inhabitants, was suddenly swallowed up by an earthquake, and let us consider how a man of humanity in Europe, who had no sort of connexion with that part of the world, would be affected upon receiving intelligence of this dreadful calamity.

In the absence of any “connection with that part of the world,” Smith asserts that the man of humanity would feel only fleeting concern for the disaster victims. By contrast, “The most frivolous disaster which could befall [sic] himself would occasion a more real disturbance. If he was to lose his little finger tomorrow, he would not sleep tonight.” He concludes this first stage by observing:

[P]rovided he never saw them, he will snore with the most profound security over the ruin of a hundred millions of his brethren, and the destruction of that immense multitude seems plainly an object less interesting to him, than this paltry misfortune of his own.

Casual readers often reduce Smith’s argument to this initial segment (Singer 2009: 50). But the main lessons emerge only in the wake of further questions: “To prevent, therefore, this paltry misfortune to himself, would a man of humanity be willing to sacrifice the lives of a hundred millions of his brethren, provided he had never seen them?” Smith answers no, then poses his ultimate question:



[W]hat makes this difference? When our passive feelings are almost always so sordid and so selfish, how comes it that our active principles should often be so generous and so noble? When we are always so much more deeply affected by whatever concerns ourselves, than by whatever concerns other men; what is it which prompts the generous, upon all occasions, and the mean upon many, to sacrifice their own interests to the greater interests of others?

Smith claims that our senses of duty and self-sacrifice are generally *not* inspired by “that feeble spark of benevolence which Nature has lighted up in the human heart” but by the voice and authority of the impartial spectator:

It is reason, principle, conscience, the inhabitant of the breast, the man within, the great judge and arbiter of our conduct . . . he who, whenever we are about to act so as to affect the happiness of others, calls to us, with a voice capable of astonishing the most presumptuous of our passions, that we are but one of the multitude, in no respect better than any other in it; and that when we prefer ourselves so shamefully and so blindly to others, we become the proper objects of resentment, abhorrence, and execration. . . . It is he who shows us the propriety of generosity and the deformity of injustice; the propriety of resigning the greatest interests of our own, for the yet greater interests of others, and the deformity of doing the smallest injury to another, in order to obtain the greatest benefit to ourselves.

Insisting once more that benevolence is too feeble to be the backbone of conscience, Smith concludes:

[U]pon many occasions . . . [what] prompts us to the practice of those divine virtues is not the love of our neighbor, it is not the love of mankind . . . It is a stronger love, a more powerful affection, which generally takes place upon such occasions; the love of what is honourable and noble, of the grandeur, and dignity, and superiority of our own characters.

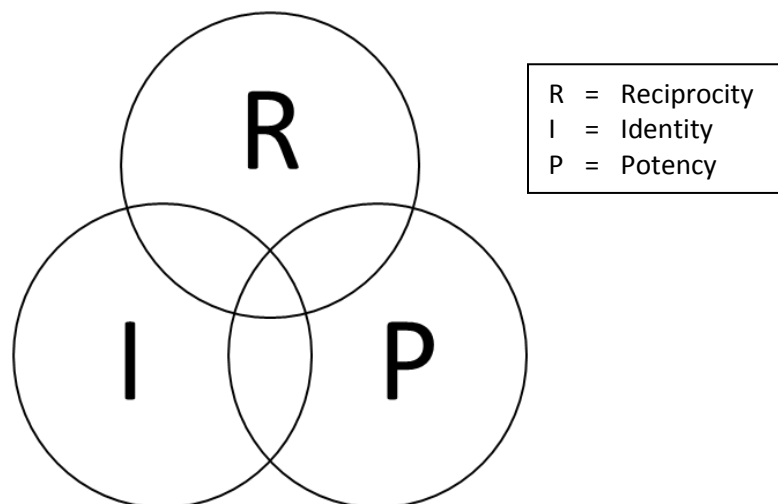
In microcosm, this parable reveals the subtle array of factors that animate the Smithian sense of duty. Smith’s analysis presumes that all persons, not just “men of extraordinary magnanimity and virtue,” are capable of learning when, how, and how much to “sacrifice their own interests to the greater interests of others” as they acquire the Smithian virtues of prudence, beneficence, justice, and self-command. The actor’s sense of duty in the “Empire of China” story is explicitly shaped by all four, since in addition to the man’s evident prudence and self-command, he is inspired by “the propriety of generosity” (beneficence) and by “the deformity of injustice” (justice).

Importantly for Smith’s theory, the actor’s sense of duty in this case is triggered by an awareness of his influence over the welfare of the distant Chinese. Though the actor is initially powerless to prevent or ameliorate the distant strangers’ suffering, a sense of duty emerges, compelling him to sacrifice his little finger, once he discovers his power “to affect the happiness of others.”

Additional dimensions of Smith’s theory can be gleaned from his emphasis on the ethical shallowness of the man’s response. Why is the man moved to act only by his self-loving desire to protect or project the nobility, grandeur, dignity, and superiority of his own character, not by any active sense of empathy or compassion for his fellows? Recall two crucial premises: (1) “he never saw them” (a caveat twice noted by Smith); and (2) he had “no connection to that part of world” hence no reservoir of gratitude or fellow-feeling for the imperiled strangers. The man’s *only* connection to the distant strangers was his ability to prevent the disaster by sacrificing his finger. Conversely, if the man had experienced some previous visual contact with the would-be victims (via travel or images) or other forms of cultural or commercial connection, he might have felt a greater sense of familiarity with them and a heightened desire or sense of duty to render assistance.

In conjunction with his discussion of superior prudence in *TMS VI*, Smith’s Empire of China story provides elements of a robust theory of informal duties beyond the intimate order. Smith posits three overlapping sets of circumstances which can trigger a person’s sense of connection and duty to assist others, as summarized in Figure 2.

**Figure 2**  
**Engines of Informal Duty**



*Potency*

Though most undergraduate textbooks identify Smith’s economics with the ethical atomism of neoclassical “perfect competition” (Milgate 2009), Smith assumes that actors are conscious of their influence over others’ well-being – their causal potency – within certain domains, and that our beneficent inclinations are generally “stronger or weaker in proportion as our beneficence is more or less necessary, or can be more or less useful” (*TMS VI.ii.intro.3*: 218). Hence, other factors being equal, we are inclined to give more when we – or spectators whose approbation we value – become convinced that the happiness or misery of others depends in some important way upon our actions.

### *Reciprocity*

Smith highlights our ingrained human propensity for retaliation or tit-for-tat (*TMS* II.ii.1.10: 82), including our tendency to extend beneficence to persons “whose beneficence we have ourselves already experienced” and the multiple ways in which this reciprocating impulse is rewarded through extrinsic recompense and by “the sympathetic gratitude of the impartial spectator”:

No benevolent man ever lost altogether the fruits of his benevolence. If he does not always gather them from the persons from whom he ought to have gathered them, he seldom fails to gather them, and with a tenfold increase, from other people (*TMS* VI.ii.1.19: 225).

### *Identity*

Smith argues that sympathy-based identification or fellow feeling recommends two broad categories of persons to our beneficence: (1) persons “distinguished by their extraordinary situation; the greatly fortunate and the greatly unfortunate, the rich and the powerful, the poor and the wretched” (*TMS* VI.ii.1.19: 225); and (2) persons “who most resemble ourselves” (*LJA* iii.109:184), with whom we share a common identity as members of particular groups. As examples of the latter, Smith cites “colleagues in the office,” “partners in trade,” “neighbors,” and persons “to whom we attach ourselves [as] the natural and proper objects of esteem and approbation” (*TMS* VI.ii.1.18: 224-225). Category (2) would include persons recommended to us by shared bonds of culture, ethnicity, race, nationality, ideology, gender, class, or other forms of affinity through which we come to regard fellow members as part of “us” (Young 1997: 72). In all cases, Smith assumes that our sense of identification with fellow members of various groups will inspire added degrees of familiarity, sympathy, and beneficence. Individual identities thus become knowledge surrogates: symbolic markers that prompt us to feel some level of affection or concern for fellow group members, many of whom we will never encounter personally. In this important sense “[a] common identity can substitute for face-to-face relations” (Offer 1997: 468; see also Lewis 2014).

### **Beneficence and the strength of weak duties**

To further establish the importance of informal associations and duties in Smith’s moral philosophy, we must revisit his underappreciated concept of beneficence. Smith appears to denigrate the social role of beneficence in his oft-cited claim that beneficence is “less essential to the existence of society than justice,” “the ornament which embellishes, not the foundation which supports the building” (*TMS* II.ii.3.4:86). The reach and influence of beneficence seem even narrower in light of Smith’s assertion that “[b]eneficence is ‘always free,’” (*TMS* II.ii.1.3:78), underscoring the weakness of beneficence as an imperfect duty – in contrast to the “perfect” duties of negative justice (Montes 2004: 93; Boyd 2013: 452) – whose precise obligations are “left to the freedom of our own wills” (*TMS* II.ii.1.5:79).

Upon closer examination, however, Smithian beneficence is a more potent catalyst of voluntary cooperation and assistance than his critics and champions have recognized. Modern readers often conflate beneficence and benevolence but Smith clearly treats them as separate terms. Beneficence for Smith is a virtue, not a behavioral motive (Hanley 2009: 183); and like all

Smithian virtues, it entails a judicious balance of self-care and care for others. Also commonly overlooked is Smith's dual definition of beneficence as both capacity (virtue) and achievement: the performance of praiseworthy "good offices" (Montes 2004: 106) and the acquired habit (virtue) of performing meritorious deeds. And even as Smith stresses our "very limited powers of beneficence" (*TMS* VI.ii.intro.2:218), he clearly regards each person's "limited powers" not as a fixed quantum but an acquired capability that can grow or erode over time.

Hanley notes that Smithian beneficence, unlike condescending magnanimity, is "marked by the benefactor's commitment to the moral equality and dignity he shares with other human beings" (Hanley 2009: 204 and 208). Of particular importance for the present argument, Smith refuses to confine the socio-spatial scope of beneficence to the intimate sphere of close friends and family members. Especially in *TMS* Book VI where he ascribes multiple motives to beneficent action, including fulfillment of social norms and identities, perceived influence over others' well-being, and reciprocal gratitude, Smith opens the door to understanding the diverse moral attachments that arise among non-kin and the emergent nature of the order in which individuals are recommended to our care and attention.

In the language of contemporary social science, received interpretations of *TMS* fail to appreciate Smith's novel emphasis on the strength of weak duties (Granovetter 1973): the self-organizing forces of voluntary action that paradoxically emerge from the very weakness of beneficence as an informal duty which "cannot, among equals, be extorted by force" (*TMS* II.ii.1.6:80) and whose reach is forever constrained by individuals' limited concerns, knowledge, and imagination.

Smith posits a host of incentives and feedback loops that inspire and guide beneficent action, and that foster growth in individuals' beneficent desires and capacities over time. The major incentive, in Smith's view, is the human longing for eudaimonic happiness associated with the "consciousness of deserved reward" (*TMS* II.ii.3.4:86). Beneficence "always pleases the spectator and merits praise and gratitude," Smith argues; conversely, "a want of beneficence" always jars the spectator and merits condemnation" (Forman 2010: 222). Moreover, the very scarcity of our "limited powers of beneficence" (*TMS* VI.ii.intro.2:218) gives rise to corrective feedback as individuals are compelled to (re)examine and (re)allocate their limited supplies of attention, care, time, money, and other resources. As new knowledge and circumstances give rise to new priorities and conflicts, individuals assess the opportunity costs of their current commitments and allocate greater care and attention to persons or projects where they feel the greatest senses of duty, joy, or efficacy. In these ways, "Smith left beneficence and all of the softer virtues like friendship, generosity, and charity to the ordinary governance of the sympathy process," to be "regulated by human connection, interest, and capacity" (Forman 2010: 224-226; see also *TMS* II.ii.3.4:86), in contrast to the strong duties of negative justice, compliance with which warrants coercive enforcement by the state but merits "very little gratitude" (*TMS* II.ii.1.9:82) from fellow citizens.

Adam Smith was hardly sanguine about sympathy-based cooperation. He never lost sight of the "weakness and partiality of benevolence" (Coase 1976: 544) or the destructive factionalism

engendered by the human thirst for sympathy (Levy and Peart 2009) or the tendency for factions to become echo chambers that prevent members from receiving critical feedback on the (im)propriety or (in)justice of their conduct. Smith emphasizes our human propensity to lionize superiors and denigrate those of inferior rank (Hanley 2009: 50), and the myriad forms of parochialism that incline us to give preferential regard to certain types of persons over others. He would be unsurprised by critics of contemporary philanthropy, for example, who claim that certain groups or problems (e.g., those with identifiable victims) tend to receive disparate shares of public attention and help while others remain faceless statistical abstractions (Atkins and Aguilar 2012). For Smith, therefore, the “strength” of weak duties may be good or bad – productive or corrosive of social order – depending on the norms taken up by culturally imbued agents.

### **Smith’s *oikeiōsis* revisited**

The preceding discussion diverges from received understandings of Adam Smith’s moral philosophy, particularly on the issue of Smith’s appropriation of the Stoic *oikeiōsis* concept. Standard classical liberal interpretations construe Smith’s *oikeiōsis* narrowly, as an acceptance of the “concentric structure of human affection and care” as an “empirical fact” of the human condition (Forman 2010: 8) which imposes, in turn, strict limits on the reach of human sympathy and duties, rendering Smith a moral localist or anti-cosmopolitan (Forman 2010). On this view, *TMS* and *WN* pertain to separate spheres: local cooperation via direct mutuality and extensive cooperation among strangers via the surrogate mutuality of commerce (Den Uyl 2010: 285-286). I view Smith’s *oikeiōsis* not as an anthropological constraint that determines in advance the relative efficacy of commercial vs. non-commercial forms of social cooperation but as an ongoing social-economic process of specialization: people (re)negotiating their positions within the commercial *and* non-commercial divisions of labor and care, each at liberty to claim ownership of “that particular portion of [the great society of mankind] which [is] most within the sphere both of his abilities and of his understanding (*TMS* VI.ii.2.4).

Forman and Otteson, even as they acknowledge the “spatial complexities” in Smith’s moral theory (Forman 2010: 139), furnish indirect support to the standard classical liberal view of Smith’s *oikeiōsis* by insisting that Smithian sympathy arises principally from “the familiarity that develops over time among those who inhabit the *oikos*, among those who very literally share physical space” (*ibid.*: 8). As Otteson puts it, Smithian sympathy and benevolence rise in direct proportion to “our level of familiarity” with others, with familiarity defined as direct, personal knowledge of another person’s “circumstances, passions, and interests” (2002: 4).

Extending this narrow view of familiarity and sympathy to the realm of normative ethics, Otteson finds in Smith a concentric view of duty, predicated on the notion that “the descending degree of concern we naturally feel matches our familiarity with others and suits our ability to take care of them” (2002: 86). Forman too describes Smith as an ethical localist for whom the proper scope of moral concern was remarkably narrow. She takes for granted, as does Otteson, the practical irrelevance of weak (imperfect) duties in Smith’s theory, as though the only salient duties for Smith are the perfect duties of justice. Forman contends, for example, that “[a]n act of good-will, humanity, and generosity that crosses this boundary was supererogatory for Smith

– generally meritorious and deserving of praise, though not always, but certainly beyond what practical morality demands of us” (2010: 20).

Alternative views of Smith’s *oikeiōsis* are advanced by Brown (1994) and Montes (2004, 2008). While they acknowledge the “range of meanings” associated with the Stoic concept, Brown and Montes each emphasize the broader definition of *oikeiōsis* introduced above: “the process of making something one’s own and making something dear to oneself” (Brown 1994: 95). In fact, Montes argues that Stoic *oikeiōsis* is a major underpinning of Smith’s concept of sympathy, as both notions speak to the transformation of *allogtrion* (alien) to *oiken* (familiar) (Montes 2008: 40-44). Carrying their interpretations one step further, Brown and Montes cast the Stoic *oikeiōsis* concept as “an account of the process of moral and psychological development from the early stages of childhood to that of the mature moral agent” (Brown 1994: 95; Montes 2008: 45).

Interestingly, Forman and Otteson offer their own pregnant observations regarding Smith’s *oikeiōsis* and the ways in which it deviates from orthodox interpretations. Forman devotes considerable attention to the revisionist claim that “[m]oral distance for Smith was not merely a physical concept” (2010: 5). Despite her claim that Smith held predominantly physicalist notions of sympathy and moral connection, Forman finds evidence of an alternative Smithian view of sympathy and moral distance in which sympathy is “impacted in very complex ways by the cultural, affective, and physical proximity of the person or object being judged” (6). Otteson too notes that “our common nature makes it possible to imagine ourselves in the shoes of any other person, and hence we can in principle achieve sympathy with anyone whose situation becomes known to us” (Otteson 2002: 141). Without invoking the Stoics, Otteson claims that the development of each person’s moral awareness and virtue from infancy to adulthood – Brown’s main definition of *oikeiōsis* – is among Smith’s major contributions in *TMS* (2002: 9).

These alternative views of Stoic and Smithian *oikeiōsis*, like Smith’s own analysis of moral proximity in *TMS*, invite a more fine-grained, social-scientific analysis of “distance” and “proximity,” and of the manifold informal connections that arise from reciprocity, identity, or “when the happiness or misery of others depends in any respect upon our conduct” (*TMS* III.3.5:137-138). Postulating multiple avenues by which previously unknown persons are “recommended to our beneficence” (*TMS* VI.ii.1.20:225), Smith acknowledges that our “beneficent affections” often “draw different ways”; yet he insists that most people are capable of employing their ethical judgment to resolve such conflicts, propelled by a desire for internal accord with their impartial spectator (*TMS* VI.ii.1.22:226-227; see also Brown 1994: 35-37; Fleischacker 1999). We “stand in need of no casuistic rules” to navigate these competing claims, Smith argues. One’s ethical priorities at each unfolding moment cannot be inferred from any predetermined hierarchy of blood ties or geographic proximity. The order in which moral objects are recommended to our attention and care is “an order defined in the process of its emergence” (Buchanan 1982), a case-by-case ordering shaped by the shifting interests, associations, and judgments that constitute each person’s “natural affections” and moral imagination.

In a candid postscript to her 2010 book, Forman acknowledges that “Smith’s localism . . . is a product of his eighteenth-century world” and that “he would have come to different conclusions about the scope of moral obligation in a time like ours” (2014: 291). Undoubtedly, Smith’s *TMS* theory of non-commercial cooperation does offer immensely illuminating applications to our “networked society” (Benkler 2006: 376), e.g., micro-philanthropy (Bishop and Green 2010), digital gifts (Elder-Vass 2014), sharing economies, and sharing/commercial hybrids (Lessig 2008), to name but a few. Forman, however, underestimates the degree to which Smith’s analysis *on its own terms* opens the door to a “broader sense of cooperation and care” among non-intimates. Bearing traces of the separate spheres interpretive tradition, Forman doggedly pursues the question of whether Smith is a cosmopolitan or a localist, rightly concluding that he is not the former. In so doing, she recognizes but gives too little weight to the muddy middle: the intermediate space between intimate familiars and faceless strangers that remains undertheorized and largely invisible.

### **A new Smithian economics**

The enduring notion that *TMS* and *WN* pertain to different scales and forms of social cooperation stems in part from the Cold War context in which Hayek and other classical liberals crafted their anti-socialist arguments (Hayek 1988). During and after the “socialist calculation debate,” Hayek’s brief for free-market liberalism was framed by an ideologically charged dualism pitting the cosmos logic of liberalism against the taxis logic of socialism. The same template was unfortunately applied to Adam Smith’s two great works (Hayek 1978: 116-122). Promulgated over several decades by “the Adam Smith tie-wearing conservative policy community” (Boettke 2012: 5), this old-school interpretation of Smithian economics is characteristically monist:

- the individual: one human nature (narrow self-interest)
- the economy: one system of extensive cooperation (commercial markets)
- Adam Smith: one ideological position (Chicago School) based on one book (*WN*)

The new Smithian economics, visibly emergent since 1990 and arguably more faithful to the letter and spirit of Smith’s writings, is immanently pluralist:

- the individual: multiple motives (varying mixtures of self- and other-regarding behavior)
- the economy: an institutionally diverse web of cooperation and assistance (commercial and noncommercial processes of specialization and trade)
- Adam Smith: no longer a single orthodoxy but a philosophically diverse conversation (Klein 2012) in which “more liberal elements of the left and right sides of the old political spectrum” can “work together to articulate a new vision of the free society” (Lavoie 1994: 283) via “extended present” dialogues between *TMS* and *WN* (Boulding 1971)

The new conversation offers a broad canvass on which proponents of contending conceptions of each Smithian element (market process, sympathy, propriety, ownership, specialization, justice, duty, virtue, civil society, government, and so on) can claim a place and enter into fresh dialogues with fellow participants. As such it could provide a disciplinary and transdisciplinary

platform upon which to revamp economics as social theory and moral philosophy, and to move beyond the Newtonian-Walrasian social physics that is still widely associated with Adam Smith (Montes 2004: 130-164; Milgate 2009).

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