

A PHILOSOPHICAL REVIEW OF POVERTY

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This report explores how poverty has been understood and analysed in contemporary political philosophy.

Philosophers have raised important questions about the concept of poverty as it is currently used in contemporary policy discussions. This report examines:

- how absolute and relative poverty should be defined;
- if 'relative poverty' is really a measure of inequality rather than poverty;
- whether the notion of poverty should be defined in terms of lack of resources, or more broadly in terms of lack of 'capabilities'; and
- how public policy can improve the lives of those currently living in poverty.

CONTENTS

Executive summary	03
1 Introduction	04
2 Poverty and contemporary political philosophy	06
3 Amartya Sen and poverty as 'capability deprivation'	09
4 Nussbaum on gender, poverty and capabilities	17
5 Is poverty 'capability deprivation'?	25
6 Contemporary philosophical analysis of poverty	28
7 Contemporary philosophical analysis of poverty and global justice	36
8 Other contemporary egalitarian thought and its bearing on poverty	41
9 Conclusion	49
References	51
Acknowledgements	54
About the authors	55

EXECUTIVE SUMMARY

As part of its anti-poverty strategy for the UK, the Joseph Rowntree Foundation has undertaken a review of different approaches to poverty in contemporary political philosophy, drawing out key contested concepts that relate to poverty and how we understand it from different theoretical standpoints.

The research reviewed and reflected upon major contributions to recent political philosophy on social justice, equality and poverty.

Key points:

- Recent philosophical work questions the usefulness of the concept of poverty as traditionally understood as a central focus of analysis for social justice.
- The popular ‘capability approach’ assesses lives in terms of what people can ‘do and be’.
- Many variables influence individual capability, including: personal resources (such as talents and skills); external resources (including, but not limited to, income and wealth); and social and material structures (including legal, cultural and environmental factors).
- Therefore, traditional definitions of poverty in terms of income and wealth isolate just one of the many factors that determine individual capability and well-being.
- Amartya Sen proposes that poverty should be re-understood in terms of capability deprivation.
- Doing so, however, has far-reaching consequences. Poverty will be very hard to measure, and such a change disconnects the concept of poverty from more than a century of detailed empirical and theoretical research.
- In addition, poverty is such an important determinant of low capability that it deserves particular attention.
- For practical, political and pragmatic reasons the traditional concept should be retained, but it must be understood that eliminating poverty will not guarantee social justice or well-being for all, as even those who do not suffer from poverty may well suffer from capability deprivation for other reasons.

1 INTRODUCTION

The questions set out in the guidance for this report are: What position do the major philosophical traditions take on poverty? How do key principles such as social citizenship, equality, fairness, personal responsibility and liberty relate to poverty? What are the key contested philosophical concepts in relation to poverty – for example, luck and responsibility?

The mission of the Joseph Rowntree Foundation is to understand the root causes of poverty and to influence those in power to do something about it. With this mission in mind, three general philosophical questions will be at the forefront of our concern:

- What is poverty?
- What is wrong with poverty?
- What should be done about poverty?

From an analytical point of view it will be important to ask four sub-questions:

- Is a clear, coherent **definition** of poverty possible?
- Is the definition **descriptively adequate**, picking out only those who would ordinarily be recognised to be in poverty?
- Does the definition pick out a **distinct moral** category?
- What moral reasons do we have to be **concerned** about poverty?

Our methodology will be to review the philosophical writings that bear on these issues, and thereby provide the ground for answers to these questions. In Chapter 2 we will begin by noting and exploring the surprising absence of discussion of poverty in political philosophy. By pursuing this issue, we see that contemporary political philosophy presents a challenge to the importance of traditional definitions of poverty, understood in terms of low income and/or wealth. We will explore, in Chapter 3, the reasons proposed by Amartya Sen for redefining poverty as ‘capability deprivation’, which would have far-reaching consequences, and we will also explore, in

Chapter 4, Martha Nussbaum's related capability view. While accepting much of the strength of the capability approach set out by Sen and Nussbaum, we will argue in Chapter 5 for the retention of a more traditional concept of poverty, for practical and political reasons. However, we will also register some of the limitations of the concept for our understanding of social justice and individual well-being.

Having established the practical and political importance of retaining a traditional approach to poverty, we return in Chapter 6 to the discussion of poverty in contemporary political philosophy, looking at those few writers who have directly discussed poverty as part of their theories of social justice. Chapter 7 looks briefly at the more common use of the concept of poverty in discussions of global justice while in Chapter 8 we return to domestic justice and look at views in contemporary political philosophy that have a bearing on the analysis of poverty without discussing it directly. Chapter 9 sets out our conclusions in the form of answers to the questions we have listed.

2 POVERTY AND CONTEMPORARY POLITICAL PHILOSOPHY

It is fair to say that contemporary political philosophy has been dominated to a very large extent by writings that are highly sympathetic to equality, and pursue a progressive agenda. Although there are notable exceptions (such as Nozick, 1974), most contemporary political philosophy could be described as ‘pro-poor’. It is a surprise, therefore, to find that there has been very little use of the term ‘poverty’, at least in connection with ‘domestic justice’, i.e. distributive justice within one country.

Why is it that although we can find many philosophers who have built theories around notions of equality, need, disadvantage, deprivation, capability, insufficiency, and priority to the worst off, there is no major philosopher of (domestic) poverty in the contemporary debate, in the sense of using poverty as his or her central concept of analysis? At this stage of the discussion we understand ‘poverty’ in the loose sense of lacking access to a level of income and wealth that would allow an individual or family to meet a prescribed set of basic needs. In the philosophical literature there has been much discussion of poverty in relation to global justice, but few philosophers have discussed poverty in their theories of justice for developed societies.

One possibility is that the concept of poverty is being used under a different name (for example, in relation to failure to meet basic needs). One important strand in the equality literature, for instance, uses the idea of ‘sufficiency’ and it is possible that one might wish to identify ‘insufficiency’ with poverty, as we will explore later.

Another possible explanation is that the aim of most political philosophers has been to present a positive ‘ideal theory’ of justice. Given that a just society would not contain poverty, then there would be no reason to discuss it.

Identifying injustice

However, even if it is true that in an ‘ideal world’ there would be no poverty, and hence ideal theory need not mention poverty, an increasing number of theorists in political philosophy have taken the position that political philosophy is too focused on ideals, and should also pay attention to the injustices of the real world (Sen, 2009; see also Hamlin and Stemplowska, 2012). The point of such real-world approaches is to identify manifest injustice and propose appropriate remedies. According to such a view, there would seem very good reason to pay attention to issues of poverty. Yet even so, with a few exceptions to be explored later in this report, we see very little philosophical work on poverty. In fairness, the focus on real-world theory in political philosophy is relatively new, and, somewhat paradoxically, most discussion has been of a theoretical or methodological nature, rather than carrying out the project of identifying injustice. But the dominance until recently of ideal theory could partially explain the absence of interest in poverty.

The ‘currency of justice’ debate

Nevertheless, there may be a deeper reason why poverty, as traditionally understood in terms of low levels of income or wealth, is not a central focus of analysis. We can best understand the issue by discussing one of the key debates in contemporary political philosophy, known as the ‘currency of justice’ debate. Introduced by Dworkin (1981a and 1981b) and Sen (1980), it starts with an observation that goes back at least to Marx (1875), that if we make people equal in one respect it may well be that we will make them unequal in some other respect. Most obviously, if two people have different needs then providing them with the same income will leave them unequal in need satisfaction and, quite possibly, happiness. To equalise need satisfaction or happiness, income would have to be unequal. What, then, matters most? This observation sets off the search for ‘currency’ of justice: that thing of which people should have equal amounts of in an equal society (Cohen, 1989). Although some political philosophers have rejected this approach to equality, arguing that equality really concerns relations between people rather than the distribution of goods (Wolff, 1998; Anderson, 1999; Scheffler, 2003), the search for the egalitarian currency has raised important issues that bear on the place of poverty in the theory of justice.

Ronald Dworkin concentrated primarily on two different theories of equality: equality of resources and equality of welfare. While acknowledging that resources only have instrumental value, Dworkin (1981b) concluded that egalitarians should prefer a resource-based theory of justice, which is also the conclusion of John Rawls (1971). Others, such as Arneson (1989), favoured a welfare (modified subjective preference) theory, while Cohen (1989) argued for a hybrid of resources and welfare, which he called ‘advantage’. Sen, and later Nussbaum, argued for a ‘capability’ view (Sen, 1980, 1999; Nussbaum, 2000). On the capability account, what matters is not what you possess, or how happy or satisfied you are, but what you are

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able to 'do or be'. We will look at the capability theory in much more detail in later chapters, but the importance of the issue is that placing poverty, as currently understood, in the centre of an approach to social justice seems implicitly to take a position in the currency of justice debate.

To assume that income and wealth are at the heart of issues of social justice appears to assume the resourcist position of Dworkin or Rawls. Although it may be possible to back up such an approach with solid arguments, the current sentiment in political philosophy is much more sympathetic to the capability approach, for the reason that what people can do and be is much more important than what they own. How one's life goes is determined by at least three sorts of factors: 'personal resources', such as talents and skills; 'external resources', including, though not limited to, income and wealth (a social network is another type of external resource); and the social, cultural, legal and material structure in which the person operates. These factors combine to determine an individual's opportunities (Wolff and de-Shalit, 2007). Hence we see that, in principle, income and wealth are just some of the determinants of one's capabilities and poverty only one possible cause of capability deprivation. For reasons such as these, Sen proposes to redefine poverty in terms of 'capability deprivation', rather than income and wealth (Sen, 1999). If Sen's argument were accepted it would have very far-reaching consequences for debates and policy discussion concerning poverty. It is vital to turn to the work of Sen and Nussbaum to understand their motivations for re-thinking poverty as capability deprivation.

3 AMARTYA SEN AND POVERTY AS ‘CAPABILITY DEPRIVATION’

Sen puts freedom at the centre of his theory of development (Sen, 1999). He identifies freedom as of intrinsic importance and, thus, the ultimate end of development. At the same time he recognises that it has instrumental value, and should be considered an important means to development.

Focusing on freedom encourages an integrative approach to development, since various forms of freedom are instrumental to other types. For example, political freedom is enhanced by economic freedom. Freedoms or opportunities in the forms of education and health care in turn are fundamental for economic and political opportunities. Many of these freedoms require public action. At the same time, freedoms and opportunities allow people to pursue their own initiatives in overcoming deprivation, instead of being passive recipients. The major point of departure of Sen’s theory from other theories of development is not to focus only on income and Gross National Product (GNP), which may correlate poorly with human well-being and freedom. Sen acknowledges that resources are means to achieving freedoms, but freedom has other determinants, for example, social provisions and political rights. Sen takes the view that it is better to focus on the objective of development rather than some particular means or aspect of the process. Development requires the removal of various sources of unfreedoms. A key one is economic poverty, but poverty can also be due to ineffective institutions, social arrangements, and a lack of political freedoms.

Development as an integrated process

Sen writes that we should see development as an ‘integrated process of expansion of substantive freedoms that connect with one another’ (Sen, 1999, p. xii). We should integrate economic, social and political considerations. This approach, Sen claims, helps us see the relevance to development of various institutions, including markets, governments, political parties, civic institutions, and opportunities for dialogue and debate. The approach also clarifies the influence of cultural norms and social values on opportunities. For example, traditional gender roles in some cultures restrict the opportunities women are able to pursue.

Forms of unfreedom

Having characterised poverty as a lack of freedom, Sen argues that many people in the world suffer from various forms of unfreedom: for example, famines, under-nutrition, little access to health care, sanitation or clean water, and premature morbidity. Even in developed countries, some people lack access to health care, education, employment, and social and economic security. Inequality between men and women affects the freedoms and opportunities of women. Another main source of deprivation experienced by many people across the world is the lack of political liberty and the denial of basic civil rights. Democratic rights are related to economic security. For example, Sen argues that famine does not occur in democracies because a government that allowed famine would not be re-elected. However, political liberties are also important in their own right. Political participation and civil liberties are constitutive of human freedom: process is vital as well as outcome.

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Capabilities

The ‘building block’ of development, for Sen, is formed of capabilities. A capability is a type of substantive freedom. We should care about the capabilities of people to live the life they value or have reason to value. Capabilities can be enhanced by public policy, and public policy can be influenced by the effective use of participatory capabilities by the public.

Key freedoms

Sen identifies freedom as having two important roles: evaluation and effectiveness. According to the first, freedom provides the grounds for assessing the success of a society. We evaluate societies according to the capabilities members have; what freedoms they enjoy. At the same time, capabilities are the preconditions for a successful society. If people have more expansive capabilities, they can be active members in their society, able to play a part in governing their own destiny, looking after their interests, influencing their society and assisting others, all of which contribute to the process of development.

Unlike Nussbaum (see Chapter 4), Sen does not give a list of the central capabilities, but he does list key freedoms that are valuable in themselves and also of instrumental importance because they help secure the overall freedom of people to live the life they choose. Sen lists the following freedoms.

Political freedoms

'The opportunities that people have to determine who should govern and on what principles. The possibility to scrutinise and criticize authorities, to have freedom of political expression and an uncensored press, to enjoy the freedom to choose between different political parties.'

Political entitlements associated with democracies: 'opportunities of political dialogue, dissent and critique, as well as voting rights and participatory selection of legislators and executives' (Sen, 1999, p. 38).

Economic facilities

'The opportunities that individuals respectively enjoy to utilize economic resources for the purpose of consumption, or production or exchange. The economic entitlements that a person has will depend on the resources owned or available for use as well as on the conditions of exchange, such as relative prices and the working of the markets.'

As economic development increases the income and wealth of a country, this enhances the economic entitlements of the population. In this relation between national income and wealth and the economic entitlements of individuals, distributional considerations are important as well as aggregate ones. How additional incomes generated are distributed makes a difference. 'The availability and access to finance can be a crucial influence on the economic entitlements that economic agents are practically able to secure.' (Sen, 1999, p. 39)

Social opportunities

'The arrangements society makes for education and health and so on, which influence the individual's substantive freedom to live better. These facilities are important not only for the conduct of private lives (such as living a healthy life and avoiding premature mortality) but also for more effective participation in economic and political activities.' For example, illiteracy can be a major barrier to participation (Sen, 1999, p. 39).

Transparency guarantees

'Society is based on some basic presumption of trust. Transparency guarantees deal with the need for openness that people can expect: the freedom to deal with one another under guarantees of disclosure and lucidity. When that trust is seriously violated, many people are adversely affected by the lack of openness.'

Transparency guarantees have an important instrumental role in preventing corruption, financial irresponsibility and underhand dealings (Sen, 1999, p. 39).

Protective security

There is a need for a social safety net to protect people who are affected by material changes that adversely affect their lives, from being reduced to abject misery or even starvation or death. This includes fixed institutional arrangements such as unemployment benefits and supplementary incomes, as well as ad hoc measures such as emergency relief (Sen, 1999, pp. 39–40).

Links between freedoms

These freedoms help secure other capabilities and also interrelate, enhancing the others. Most attention has been paid to economic facilities enhancing economic growth. However, Sen points out that focus has mainly

been on the effect on the private income of individuals. Yet one should also attend to the important benefits to society, for example, increased finances to fund public services, expanding social security. Moreover, there are other connections among these freedoms. As Sen describes:

... creating social opportunities, through such services as public education, health care and education and the development of a free and energetic press can contribute both to economic development and a reduction in mortality rates. Reduction of mortality rates, in turn can help to reduce birth rates reinforcing the influence of basic education – especially female literacy and schooling on fertility behavior.

– Sen, 1999, p. 40

Markets

The nature of Sen's approach is brought out well through his discussion of markets. Sen states that arbitrary restrictions on one's participation in markets inhibits development. It denies people economic opportunities, which restricts growth. There is a type of efficiency that only free markets can achieve, and the worry regarding centrally planned economies is that they can make the wrong choices for people. However, Sen argues that even if a centrally planned economy made all the right choices, there would still be something lost in this arrangement. This is because it is important, Sen insists, that people have the freedom to make their own choices. Sen draws a parallel with slavery. Even if slaves had the same wages, or even a longer life expectancy as free agricultural labourers, slavery would still be perceived as an evil because people want to make their own employment choices.

The deprivation of capabilities and low income

In a vitally important move that chimes with his general analysis, Sen argues that poverty is the deprivation of basic capabilities, not merely low income. However, he acknowledges that deprivation of capabilities is linked to low income. There is a two-way relationship. Low income can be the reason why one lacks a capability, and a capability deprivation can lead to low income. Greater capabilities expand a person's opportunities to be economically active.

However, we should not make the mistake of thinking that the connections between capabilities and income mean that the latter tell us enough about the former. As Sen says 'The connections are not that tight and the departures are often much more important from a policy point of view than the limited concurrence of the two sets of variables' (Sen, 1999, p. 20). We will have a much better understanding of poverty if we focus on capabilities instead of only on income, both the poverty that exists in low-income countries and in high-income countries. Sen gives many good reasons for measuring poverty as capability deprivation rather than low income. First, income is only instrumentally important; it only matters in so far as it allows us to live a life we choose, so it is better to focus on the capabilities to which income is a means. Furthermore, income is only one determining factor of capability deprivation. There may be other reasons

why people suffer capability deprivation, for example, due to social norms or inadequate civil liberties.

The deprivations people in poverty in poor countries suffer are not reflected in income alone, for example, premature morbidity, persistent morbidity, undernourishment and illiteracy. The phenomenon of missing women, for example, which results from unusually high gender- and age-related morbidity rates in some parts of the world, requires demographic, social and medical information to be perceived, and would not be captured in data regarding income levels alone.

Another reason is that the way that income bears on capability deprivation varies across communities, even across family members and different individuals. The extent to which income can translate into capabilities depends on different factors, for example, age, location and environment. For some people, income will not help them acquire certain capabilities, or they require much more income than others to achieve certain functionings, because of their circumstances. They may have particular needs due to old age; they may face limitations due to their social roles, or have additional burdens due to the geographical or social hazards in their environment. There are some couplings of disadvantages between income deprivation and other factors, making it harder to convert income into capabilities. For example, a disability makes it harder to earn an income, and at the same time, more income is required than for people without disabilities to achieve the same functionings. The same may be true of the elderly or the sick. This adds a deeper dimension to poverty than income levels alone.

Focusing only on income levels may hide the fact that some people within a family receive less than other family members. For example, in some cultures, males are provided with many more opportunities than women. More family income may be spent on male family members than on females. Deprivations that girls and women within families with such a bias suffer will be captured by looking at capabilities, instead of income. This gender bias is rarer in the West but may occur within some cultures within developed countries as well as in developing ones. Some degree of gender inequality, even if more slight, is still prevalent in many families the world over, so this remains a relevant consideration in most parts of the world.

Focusing on capabilities

Sen argues that focusing on capabilities gives a better understanding of poverty in affluent countries. Income levels do not reflect deprivations that people in highly developed countries may suffer. For example, in many high-income countries there are high rates of unemployment. The effects of this on one's resources may be minimised through the provision of welfare and social security. However, other forms of deprivation, not captured by income levels, persist, such as diminishment of personal freedom and skills. Unemployment can add to the social exclusion of some groups, lower one's self-respect, and bring about psychological and physical health problems. Another consideration is that relative income inequality can mean absolute capability deprivation, as in suffering social exclusion as a result of having less than others in society. A poor person in a rich country may have more income than a poor person in a poor country, but less than the social norm, so they may suffer some capability deprivations that a person in a poor country does not experience. Because social norms differ, something that might be regarded as a shameful deprivation in a wealthy society could be

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regarded as perfectly normal in a poorer society. Hence in this respect a relatively poor person in a rich society could suffer an instance of deprivation not suffered by anyone in a poorer society, even if the latter suffers greater deprivations in other terms.

Life expectancy

Another striking fact that income measures miss is that in some high-income countries, people have the same, or even lower life expectancies than in low-income countries. For example, in the African American community in the USA, life expectancies are comparable to those in poor countries. Sen's figures reveal that in the 1990s, African American men had lower life expectancy than 'the immensely poorer men of China, or the Indian state of Kerala' (Sen, 1999, p. 96; see also p. 22). Even though members of the African American community have much higher income than those in developing countries, they may live a shorter life. Lifespan is an important capability. This shows, Sen suggests, that income is not the right measure of poverty.

Capabilities and functionings

While Sen makes clear that we assess the development of a society or the situation of an individual by looking at their substantive freedoms, he leaves many things open. First, he puts forward the option of either taking capabilities to be the measure, or realised functionings. The former is concerned with one's opportunities, the second with what one actually does. There is support for the latter in traditional economics, which finds the value in a set of options in the use that is actually made of them. However, Sen suggests that capabilities may be the more appropriate focus since there is value in having options even if they are not taken up; there is value in the choosing itself when one opts to exercise a functioning, not just in having the functioning. Sen, however, does not conclusively state which should be our concern, whereas Nussbaum, by contrast, makes clear that we should focus on capabilities, and not functionings. Secondly, Sen does not state which functionings and corresponding capabilities should go on the list of important achievements. This, Sen is aware, will lead to substantial debate. The valuational issue is an inevitable consequence of this form of evaluation, Sen states. He regards it as a strength of the approach that it makes explicit that this judgemental exercise will need to take place, and may be debated, rather than smuggling value judgements into the framework.

Assessing functionings

Sen points out that individual functionings lend themselves to interpersonal comparison much more effectively than utility comparisons. Yet he recognises that we may also want to assess overall advantage, so we require some aggregation of a heterogeneous range of indicators. Sen acknowledges that we need a way of weighting different functionings, since some are more important than others. We also need a weighting of the value of achieved functionings against one's capability set; one's freedoms to function. Additionally, Sen recognises that capabilities are not our only concern. We might also attach importance, for example, to rules and procedures and not just freedoms and outcomes, so we may also need to know how to weigh capabilities against other relevant considerations.

Sen, while acknowledging these open questions, does not regard them as weaknesses in the approach. Rather, Sen thinks that it is a merit of the

approach that it does not invoke one homogeneous vector as, for example, utilitarianism does. There is no precise criterion of freedom such that we can rank and compare different experiences of development. The approach is not intended to allow us to rank states in order, but to focus our attention on the important aspects of development. It is not a weakness of the theory, Sen insists, that there could be many different possible rankings. It is right that we should face a complex range of evaluative demands. This reflects the complexity of our human lives, rather than oversimplifying things for ease of assessment. While this seems true, we may still worry about our ability to apply the theory in practice. Sen makes clear that the critical issue is not that we lack an answer to these questions but that an answer must be achieved through social dialogue. This need for explicit valuations rather than having a mechanical index, Sen suggests, is thus an advantage to the approach because it encourages public dialogue.

Public participation

Public dialogue has an important role in a society that uses the capability approach. It is both a requirement to allow the capability approach to work, and an important functioning in itself. Another important role of public participation is to resolve the tensions that exist between development policies and the norms of traditions and cultures. Sen's suggested solution is to make it a choice for those who face this dilemma. However, though people should have the choice to follow their own customs and traditions, this freedom to choose sets limits on the influence of culture in society. This means the demands of modernity should be neither unilaterally imposed by the state, nor rejected by religious authoritarians. One cannot, for example, justify media suppression or the denial of education on cultural grounds, since it is required for participatory freedom.

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Questions about Sen's approach

Sen's approach is very important as a rich, insightful way of judging how well people's lives go. It is clear that income and wealth are an inadequate measure, and Sen provides a superior alternative. However, his view leaves us with several questions. We are not given a clear idea of when we would consider a person in poverty or not. For example, Sen notes that a person with adequate income may lack important capabilities. They may have more income than others in society yet nevertheless face social exclusion, or they may be unable to participate in political activities for some reason, yet it is not clear from his theory whether we would regard this person as in a state of poverty. Poverty is an emotive word; we would expect people to be reluctant to describe a person with adequate income but other forms of deprivation as living in poverty. Perhaps, however, this reluctance would be mistaken. Yet even if deprivation of capabilities does amount to poverty, we still have further questions regarding how we identify who is poor. Would the deprivation of any capability amount to poverty? Is one in poverty if one falls under some specified threshold? Or would only the absence of certain capabilities amount to poverty?

Another point on which more clarification is needed is how deprivations of functionings, as opposed to capabilities, relate to poverty. While it seems clear that in Sen's view, poverty is the absence of certain capabilities, it is not clear if the lack of certain functionings also amounts to poverty. As discussed, Sen leaves it open whether capabilities or functionings are the relevant concept. If we considered a person lacking key functionings as in

poverty, poverty would be a descriptive concept, but not the grounds for public policy or political action, since people may choose not to exercise a capability. If we didn't consider a person lacking functionings to necessarily be in poverty, we would require an individual assessment to know if a person who lacks a functioning possesses the capability or not.

It is also not clear how we take into account issues of personal responsibility. Sen appears to regard it as necessary to give people capabilities, but makes it one's own responsibility whether they take them up. Yet it is unclear whether a person who lacks a capability due to rejecting a functioning would still be owed this capability as a matter of justice or not, and whether the element of free choice affects our rankings of how well or badly people fare.

In sum, although Sen's attempt to redefine poverty as 'capability deprivation' appears to be supported by strong reasons, we can see it leaves a number of important questions. We will explore these questions in more detail in Chapter 5, once we have discussed Nussbaum's related account of the capability view.

4 NUSSBAUM ON GENDER, POVERTY AND CAPABILITIES

Martha Nussbaum takes a gendered approach to theorising about poverty. Nussbaum states that a condition of a good approach to poverty is that it can recognise particular problems that women face. Her views make an important contribution to a general understanding of poverty.

Like Sen, Nussbaum conceives of poverty in relation to an account of human capabilities. These address what people are actually able to do and to be in a way that is 'informed by an intuitive idea of a life that is worthy of the dignity of the human being' (Nussbaum, 2000, p. 5). Nussbaum is concerned with the situation of women because gender inequality is strongly correlated with poverty; women have fewer opportunities than men.

There are four core features of Nussbaum theory. First, it is philosophical; Nussbaum shows why we need philosophical reasoning to approach these problems. Second, it is universalist; Nussbaum identifies capabilities that are important for every citizen of every society. Third, the account of central human functionings is given in the context of political liberalism; it can be the object of overlapping consensus among those who have very different conceptions of the good. Fourth, it is based on respect for human dignity.

The aim of Nussbaum's theory is to set a social minimum that all governments must respect and all societies must meet. This minimum is defined in terms of human capabilities. The context of political liberalism means that this is pursued as a political goal, and that this goal can form an overlapping consensus. The goal is to get each person above the threshold level of each capability. This standard can both be treated as a social goal and as a measure enabling comparisons between countries.

Nussbaum's theory of justice

As well as providing a conception of poverty, Nussbaum's approach constitutes a theory of justice. The social minimum, defined in terms of capabilities, is not only a way of measuring poverty or understanding it, but it is also a condition of a just society, a reason for political action. Nussbaum states that 'falling under the threshold with respect to any capability is both tragic and unjust' (Nussbaum, 2000, p. 74). This is one difference between Nussbaum's approach and that of Sen. For Sen, the capabilities are a basis for a comparison, for Nussbaum, they are also a basis for constitutional principles. There are other key differences. While Nussbaum's theory requires people to meet a threshold level of capabilities, Sen argues for equality of capabilities (albeit without showing what that would mean in practice). Sen prioritises liberty as the most important kind of capability. Nussbaum, however, gives no ordering, though she does state that economic need cannot be met by denying liberty. Nussbaum also, at times, seems to base her view on the importance of liberty, since she states that liberty is valuable when one is in a position to pursue opportunities and exercise one's rights, and this requires material and institutional resources. Another key difference is that Nussbaum gives a list of core human capabilities, whereas Sen does not specify what they are. Additionally, Nussbaum makes much more explicit than Sen the view that the appropriate goal is capability, rather than functioning. What is important is that people have the capability to do something, but not that they actually do it, since they may have reasons to refrain from doing it.

Universal standards

Nussbaum supports the idea that we can assess how well people's lives are going according to a universal standard. While recognising difference, we should not overstate and essentialise cultural differences. Pluralism and respect for difference are themselves universalist values. We can find meaningful cross-cultural shared sources of value. This is the appropriate basis of a standard by which to assess people's situation. Nussbaum writes that 'Certain universal norms of human capability should be central for political purposes in developing basic political principles that can provide the underpinning for a set of constitutional guarantees in all nations.' (Nussbaum, 2000, p. 35)

In modern times, all cultures are pervaded by the influence of other cultures and within each culture is a diversity of attitudes. Nussbaum challenges the very idea of prioritising cultural norms, as she asks why we should follow the local ideas, rather than the best view we can find? Instead of deferring to cultural norms, Nussbaum claims that we should positively endorse a theory of toleration and respect, which allows us to address the intolerance of other cultures.

A universalist approach could be criticised from the point of view of the importance of diversity. However, Nussbaum tells us that the real question is which cultural values are worth preserving or not. We need a general universal framework to make this assessment. Nussbaum insists that we only have reason to value a diversity of views if these views are compatible with human dignity. The universalist approach may also be criticised for being paternalistic. However, Nussbaum sees no incompatibility between pursuing universal values and giving people the opportunity to think and decide for themselves. Furthermore, the universal framework she proposes, so she

claims, is based on people's actual choices and preferences, based on a cross-cultural consensus of what people actually value, although the exercise has not been carried out systematically.

The capability approach may give rise to the criticism that universal values are at odds with liberalism's respect for other cultures and tolerance. However, the capability approach should be seen as compatible with liberalism because part of the liberal tradition is to bring to the surface false consciousness and manipulated desires.

As well as being universalist, Nussbaum's approach is also individualist. Politics, Nussbaum states, should treat each person as an end. We should not view people merely as part of a society and pursue the general good. As each person's pain and suffering is their own, even if a person has a commitment to other people or their community, the relevant unit of concern is the individual.

Nussbaum's view is motivated by the shortcomings of the dominant approaches to measuring how well a person fares, particularly in relation to capturing the situation of women. She objects to GNP measures on similar grounds to Sen, particularly emphasising how such measures can hide the poverty of women or other disadvantaged groups, and objects to income-based measures, which are insensitive to significant variation in need. Any aggregative or average also takes together different aspects of life that should be kept separate, such as economic development and political liberty. She opposes preference-based accounts of well-being on the grounds of adaptive preferences (people becoming adjusted to a disadvantaged position), as does Sen, as well as on the grounds that some preferences are immoral and should be disregarded, such as racist, malicious or sadistic preferences. This does not mean that issues of income, resources or preferences are irrelevant to justice or equality, but that none of them is the sole basis of analysis.

List of capabilities

We are able to draw up a cross-cultural list of capabilities important for all because the emphasis is on capability to function, rather than actual functionings. In this way, people have the choice to live the life they wish, and they are equipped with the means to make that choice. As the capabilities are to underpin political principles, we must identify those capabilities that are important for any life, whatever the person chooses.

Nussbaum draws up a list of the central capabilities as a basis for her theory of justice, while acknowledging that more needs to be worked out. In particular, we need to define the threshold level below which a person lacks a capability. We also need to decide whether meeting a threshold level is sufficient, or whether we have an interest in equality. In addition, we need to work out the appropriate role of the public sphere in providing incentives to private actors, and controlling the activities of private actors in pursuing the fulfilment of the capabilities.

Nussbaum describes how the list of capabilities she provides represents an overlapping consensus. It leaves room for pluralism, since the capabilities are compatible with various forms of the good. Nussbaum puts them forward as preconditions for a good life, whatever kind of life one wishes to lead. Moreover, she supports the list with the testimony of people from various cultures and backgrounds, although it is fair to ask whether other lists of capabilities, or even distinct approaches to justice, could equally claim to

be supported from similar testimony. Such work is still to be done in detail. Nussbaum puts forward the following capabilities.

Life

Being able to live to the end of a human life of normal length; not dying prematurely, or before one's life is so reduced as to be not worth living.

Bodily health

Being able to have good health, including reproductive health; to be adequately nourished; to have adequate shelter.

Bodily integrity

Freedom of movement, freedom from assault, opportunities for sexual satisfaction, and reproductive choices.

Senses, imagination and thought

Being able to use the senses, to imagine, think and reason – to do these things in a 'truly human' way, a way informed and cultivated by an adequate education. Being able to use imagination and thought in connection with experiencing and producing self-expressive works, and events of one's own choice, religious, literary, musical and so forth. Being able to use one's mind in ways protected by guarantees of freedom of expression with respect to both political and artistic speech and freedom of religious exercise. Being able to search for the ultimate meaning of life in one's own way. Being able to have pleasurable experiences, and to avoid unnecessary pain.

Emotion

Being able to have attachments to things and people outside ourselves; to love those who love and care for us, to grieve at their absence, not having one's emotional development blighted by overwhelming fear and anxiety, or by traumatic events of abuse or neglect.

Practical reason

Being able to form a conception of the good, and engage in critical reflection about planning of one's life.

Affiliation

Being able to live with and towards others, engage in social interaction, justice and friendship; having the social bases of self-respect and non-humiliation; being treated with dignity.

These capabilities entail having protection against discrimination on the basis of race, sex, sexual orientation, religion, caste, ethnicity or national origin. In work, being able to work as a human being, exercising practical reason and entering into meaningful relationships of mutual recognition with other workers.

Other species

Being able to live with concern for and in relation to animals, plants and the world of nature.

Play

Being able to laugh, to play, to enjoy recreational activities.

Having control over one's environment

Political

Being able to participate effectively in political choices that govern one's life; having the right of political participation, protections of free speech and association.

Material

Being able to hold property not just formally but in terms of real opportunity; having property rights on an equal basis with others; having the right to seek employment on an equal basis with others; having the freedom from unwanted search and seizure (Nussbaum, 2000, pp. 78–80).

These items are separate; they are not to be traded off against each other. A shortfall in one cannot be made up through another. They are all distinct and of central importance. At the same time, they are also related to each other in many complex ways. For example, one of the most effective ways of promoting women's control over their environment, and political participation, is by improving women's literacy.

Capabilities outside government control

Some capabilities cannot be provided by government since they are the outcomes of natural contingencies. For example, some people have health problems that have natural or luck-governed causes. However, the government can mitigate the social effects of these deprivations. While the government cannot ensure the emotional health of all women, it can do much to improve it through policies in areas such as family law. Governments should do all they can to provide people with the social bases of the central capabilities. The capabilities that make up the list are what Nussbaum labels 'combined capabilities'. This means they depend on both social and material circumstances for their realisation. A government is required to help promote the development of a person's internal capabilities as well as creating an environment in which their powers can be exercised, in order for the capabilities to be achieved. A person may have an internal power, but without the right environment it cannot be exercised; for example, women with the skills to work may be forbidden to work outside the home. Conversely, one may have the right social conditions but have been prevented from developing the internal power.

Capabilities and equality

The capabilities approach is related to equality in at least two ways. First, the capabilities require the absence of any discrimination and oppression, so achieving the capabilities necessitates equal treatment. Also, relating to equal distribution, in order for people to meet the threshold level of the capabilities, it is likely that redistribution in society would be needed, and thus a great level of material equality would be achieved. However, the degree of equality required is left open. Different conceptions of egalitarianism are compatible with the capability approach, provided that it is possible to measure and weigh capabilities against each other, at least to some degree. The capability approach could fit with strict egalitarianism, requiring some sort of equalising of capability enjoyment, or with a Rawlsian difference

principle, accepting inequalities in capabilities so long as the least advantaged position is maximised, or, as Nussbaum herself suggests, with a social minimum or threshold.

Capability to function

According to Nussbaum, the appropriate focus of the approach is on capability to function and not on actual functionings. We should not aim at having people achieve certain functionings, since their conception of the good may require them not to exercise a certain functioning. The approach requires respecting such choices. What society must provide is the opportunity; it must not insist the opportunity is pursued. This distinction links the approach to Rawlsian liberalism, with its concerns about pluralism and paternalism (Rawls, 1971 and 2001). It makes the approach compatible with different ideas of what is a good life. It respects the importance of practical reasoning and the human activity of choosing. An example that brings this out is the difference between a wealthy person fasting for religious reasons, and a person starving because they do not have access to adequate nourishment. Neither has the functioning of 'being nourished' but only the latter lacks the capability. The capabilities approach in this way is similar to Rawls' approach using the primary goods. Rawls takes the primary goods to be rational to choose for whatever kind of life one wants (Rawls, 1971). Similarly, the capabilities seem necessary for almost any conception of the good we can imagine. Yet if one did have a plan of life that excluded one or more capability, we would not normally consider the person harmed by the availability of the opportunity to exercise a certain human functioning, given that they can choose not to exercise it.

A key difference is that Rawls excludes from the list of primary goods any natural goods, such as health or imagination. Rawls refrains from making the achievement of any good, the provision of which the state cannot guarantee, a political goal. However, Nussbaum takes the view that the state can guarantee the social bases of such capabilities; this is an important political goal. It also serves as a useful point of comparison. For example, we can still compare levels of health within different societies, assuming this to reflect, for the most part, the social bases of health, including health-care provision, education, and human planning. It is also possible to adjust these comparisons to take natural factors into account.

When government intervention is required

In some cases, we may regard a capability as so important, so crucial to the achievement of all others, that we may be justified in aiming for the functioning itself, rather than just the capability. An example may be health and safety, which many governments do not leave up to the choices of citizens. This may be partly because of their importance, and partly because of the difficulty of making informed choices in these areas. We are perhaps entitled to set restrictions on choices that interfere with one's ability to pursue other capabilities, within the limits set by the need to respect people's liberty. So, for example, affiliation is not only important in itself but it suffuses all the other capabilities. According to Nussbaum, we could not see any good in a life that lacked any care for others, any affiliative functioning. Therefore, we would be justified in insisting that citizens act in a way that manifests care for others, for example, through taxation or obeying the law. In other cases, a persistent failure to achieve a functioning may signify the absence of a capability, so action may need to be taken to help achieve the

capability, for example, compulsory voting to enable full participation. There may also be the need to interfere in cases where one signs away a capability permanently, as in the case of voluntary enslavement, or a marriage contract with no possibility of exit.

Nussbaum clarifies that the list she provides is not a comprehensive account of all possible conceptions of the good. One may pursue things that are not on the list and, additionally, it is acceptable to opt not to pursue a functioning in that list, if this does not impede others' pursuit of the capabilities.

Freedom of nation states to act

While capabilities are important for making clear what kind of a life each person is entitled to live, they also remain open-ended in important respects. While capabilities are the grounding of the principles each society must be built on, the particular implementation of the principles is left to each nation state. The basic intuition at the heart of the approach is that certain central human abilities exert a moral claim that they should be developed. However, this need not be linked to any particular moral theory, but rather it is a free-standing moral idea. Proponents of different moral theories can adopt the capability approach.

Nussbaum and poverty

Nussbaum does not state that the list of capabilities is a list of things that one must have in order not to be in poverty. However, it is clear that poverty, according to the capability approach, is to be understood as the lack of a capability, or certain key capabilities. In any case, a person who lacks any of the capabilities would be regarded as in a state of deprivation, even if not specifically in poverty. As with Sen's account, the approach has important implications for an analysis of poverty. The approach shifts the dominant focus on how much one has, in terms of income or resources, to the matter of what one can do with what one has. This is important, since it seems that assessing a person's holdings does not accurately tell us how badly off a person is; they may have needs that exceed their resources, even if these resources would be adequate for another person. So the capability approach would help capture cases of poverty that an approach measuring only people's income or resource levels might miss. The approach takes into account people's various circumstances so that we may find some people worse off than others even when they have the same resources. The approach is important for making accurate comparisons of how different people fare.

The approach has the advantage of emphasising the role of choice. One is not necessarily in poverty, or in a state of poverty requiring alleviation as a matter of justice, simply through failing to exercise a functioning (as in the case, for example, of 'voluntary poverty'). This may be done out of choice. However, it is always a matter of justice if one lacks the capability for functioning. Nussbaum's capability approach is important for providing a response to a common objection to the need to alleviate poverty. It is often suggested that we perceive others to be in poverty, while in fact they may have a different conception of a good life borne out of cultural difference. In this case, it is alleged, there is no need to help people out of poverty, or even stronger, it would perhaps be wrongful to, since this would involve cultural imperialism – imposing on others our own ideals. Nussbaum, however, warns against overstating this point. Cultural differences are not as great as often

The approach shifts the dominant focus on how much one has, in terms of income or resources, to the matter of what one can do with what one has.

perceived. There is a lot of common ground regarding what makes up a good life, and Nussbaum draws up her list of essential capabilities through cross-cultural shared ideas of the good. The approach Nussbaum advocates is to provide people with capabilities for functioning, with the choice to decline to exercise them. The suggestion Nussbaum makes is that people, in particular women, are denied capabilities for functionings that they would choose to exercise if they had the opportunity.

Questions about Nussbaum's approach

Nussbaum's approach gives rise to several questions. Her theory is incomplete on the question of personal responsibility. Nussbaum is clear that those who have a capability are, generally, individually responsible for whether they achieve the functioning. Yet it is also possible to lose a capability through personal choices, such as choices that may severely impede one's ability to be healthy. Are such people owed a 'second chance' or do we say that having 'squandered' the capability they have forfeited social concern? Another criticism is that Nussbaum's theory avoids hard choices: societies often have to decide whether to prioritise one policy over another; for example, food subsidies or enhanced educational opportunity. Nussbaum tells us that a society that fails to achieve a threshold level of capabilities for everyone is unjust, but she gives no guidance on how to choose between two different unjust circumstances to redress if it is not possible to address both.

Nussbaum implies that poverty is to be understood as the absence of a capability. However, we lack any definition of poverty, or details with respect to which capabilities must be absent to be in a state of poverty. Nussbaum may set out to do no more than give a framework for conceptualising poverty, but it still seems important to have a clear way of identifying poverty.

5 IS POVERTY 'CAPABILITY DEPRIVATION'?

The work of Sen and Nussbaum is undoubtedly extremely important in helping us understand the many determinants of a flourishing human life, and the nature of such a life. Their advocacy of the capability approach has set out a new way of thinking about global poverty and development.

Sen explicitly urges a redefinition of poverty as capability deprivation, given that low income or lack of wealth are just some of many different ways in which human beings can suffer capability deprivation. Sen argues that this change 'does not involve any denial of the sensible view that low income is clearly one of the major causes of poverty, since lack of income can be a principal reason for a person's capability deprivation' (Sen, 1999, p. 87). Yet from the point of view of poverty research it does lead to very significant consequences.

How can poverty be measured using the capability approach?

The first problem has been mentioned in respect to both Nussbaum and Sen. How is the capability approach to be applied in practice, in the sense of yielding an account of poverty that can be used for assessment? Sen does not make a practical proposal about what is to count as being in poverty, although there are many initiatives now to apply Sen's insights to the analysis of poverty, such as the recent development of the Global Multi-Dimensional Poverty Index (Oxford Poverty and Human Development Initiative, 2014). Nussbaum provides a more determinate approach by proposing that every individual should achieve a threshold level for each of ten capabilities. In principle, we could designate someone as living in poverty if they fail to achieve the threshold level on at least one capability. However, it still remains

to be asked what counts as the appropriate threshold and how it is to be set in a meaningful manner. The first challenge, therefore, is how to measure poverty using the capability approach.

In response, it may be said that the growing adoption of multi-dimensional approaches to the measurement of poverty vindicates the capability approach, showing how it can be operationalised. However, for practical purposes such measures use a limited range of indicators that cover only a small proportion of the capabilities indicated by Sen and Nussbaum. This is partly because of the absence of relevant data. Furthermore, the methodologies currently in use have a very low threshold for poverty, according to which poverty in the developed world would be very rare indeed. (This relates to the distinction between absolute and relative poverty discussed in Chapter 6.)

Poverty as one aspect of human deprivation

In addition to the problem of measurement, there is the question of whether the notion of poverty can be extended as far as Sen and Nussbaum wish it to be without changing the meaning of the term beyond its ordinary understanding. If an individual lacks a capability because of low income or wealth then it seems very reasonable to refer to them as being in poverty. But if the person lacks a capability because of legal discrimination (for example, a law barring members of a certain religion or race from entering a profession) or because of low skills or ill health, we would naturally be reluctant to refer to them as being in poverty merely because of the lack of capability. It seems that conceptually there is no difficulty in describing someone as rich but the victim of discrimination, or rich but unskilled or in poor health. This does suggest that rather than attempting to redefine poverty as capability deprivation, the clearer approach is to reserve the term poverty for resource-related deprivation while accepting it is only one part of possible human deprivation. In essence then, while we can agree that the capability theory is an excellent theory of human development, we should resist the attempt to redefine poverty as capability deprivation. This, for example, is the approach taken by Richard Hull, who prefers to use the term 'deprivation' rather than 'poverty', since poverty does not explain all forms of deprivation (Hull, 2007).

The advantage of Hull's approach is that poverty remains linked to low income and wealth, and is consistent with ordinary understandings of the term. Poverty and (lack of) human development are thus distinct concepts. The danger, though, of following Hull's suggestion is that it may diminish the importance of poverty. Hull is, for example, keen to argue that disability is an important source of deprivation in many societies, independently of its effect on income and wealth. And the more we emphasise other sources of deprivation, the less important poverty appears to be as a central term in analysis.

Poverty as the greatest cause of capability deprivation

Here, we can return to Sen's point that poverty is likely to be by the far the most important cause of capability deprivation. Even though we can accept that in theory this could change, poverty, understood as lacking income and resources, is the most significant contributor to deprivation around the world. There is every reason for taking it as central to political analysis and

policy proposals, given that it is a well-understood notion and the focus of many campaigns and public policies. Indeed, we have no alternative for the developed world, since no generally accepted capability measure of poverty exists that is appropriate for measuring poverty in wealthy countries. However, the work of Sen and Nussbaum is an important message regarding the limitation of the concept of poverty. As poverty does not explain all deprivation we cannot assume that overcoming poverty will be enough to eliminate deprivation. Indeed, if it were possible to overcome poverty then other determinants of deprivation would become much more apparent. But with this qualification, we feel that Sen's attempt to redefine poverty should be resisted. Rather, he has developed a new concept, '(lack of) human development', of which poverty is the most important, but not the only determinant.

As poverty does not explain all deprivation we cannot assume that overcoming poverty will be enough to eliminate deprivation.

6 CONTEMPORARY PHILOSOPHICAL ANALYSIS OF POVERTY

As noted above there is no major contemporary philosopher of poverty, although Amartya Sen is a partial exception. Several philosophers have, however, discussed poverty in various ways, and here we provide a brief survey.

In the philosophical literature, the distinction between absolute and relative poverty is well set out by Richard Hull.

The term poverty is commonly used in two ways. It is used to describe a state of affairs in an absolute sense or to describe a state of affairs relative to another. When one is described as poor in the absolute sense, one is said to be living at or below the level of subsistence. The emphasis here is on biophysical survival: if one is poor, one's needs that make living possible are not met.

– Hull, 2007, p. 9

As Hull points out, the absolute poverty level must take into account the cost of living, and thus has a relative element, and arguably, it must also take into account what is socially acceptable. However, the notion of what is socially acceptable seems to drive us in the direction of a more thorough-going relative conception of poverty, which:

[T]ends to emphasise the needs for living in a more substantive or qualitative sense. This is because it tends to pinpoint the gap, or gulf, between those who enjoy a high standard of living and those in the same society who do not, even if they cannot be said to be poor in an absolute sense ... The concept, then, becomes meaningfully operative

only after subsistence has been achieved. It is quality of life that it is currency of the relative poverty theorist rather than life itself.

– Hull, 2007, p. 10

Poverty exists according to this conception 'if people are denied access to what is generally regarded as a reasonable standard and quality of life in that society', a definition drawing on Townsend (1979).

Absolute and relative poverty

With two different understandings of poverty, there is a question of what the relation is between them. Absolute poverty, in which survival is at risk for lack of resources, is clearly a form of poverty by any ordinary understanding of that term. But is relative poverty? According to one view, relative poverty must be sharply distinguished from absolute poverty. Relative poverty appears to be a matter of inequality, and having less than others is not the same as being poor. As Sen famously pointed out, we do not want to call someone poor just because he can only afford to buy one Cadillac a day when others can buy two (Sen, 1983, p. 159).

Relative poverty

Brenda Shaw expresses powerful scepticism about relative poverty. Suppose poverty is defined in purely relative terms, such as below 60 per cent of median income, although any relative measure would work just as well for this example. Shaw points out that if poverty is defined in purely relative terms a rich, but unequal society, could have more poverty than one in which everyone is worse off in material terms, if incomes are more compressed. Similarly, as societies get richer, (relative) poverty can rise even if everyone is getting better off. All that needs to happen is that median incomes rise faster than those at the bottom. For Shaw, this shows that relative poverty is really a measure of inequality, not poverty (Shaw, 1988, p. 30).

She also implicitly attempts to discredit the idea of relative poverty by setting out some of the proposed indicators of relative poverty, no doubt chosen by her for their contestable nature. Commenting on Townsend's landmark work she says:

Judged by the 'standards and quality of life' set out by Townsend, of course many people in Britain must be seen as relatively poor. By his 'deprivation index' people are in poverty if, amongst other deprivations, they have 'not had a cooked breakfast most days of the week'; or they live in a 'Household [that] does not usually have a Sunday joint (three in four times)'; and also is one that: 'Does not have fresh meat (including meals out) as many as four days a week'. In a less schematic way, Paul Harrison, in his study of the London borough of Hackney, attempts a description of relative poverty which requires a statement of what is required for a socially acceptable life. Harrison found in 1980–81 that what his informants saw as necessary for such a life included 'a three piece suite, wall units, carpets, a fridge, washing machine and colour television, an annual holiday away from home plus several day trips a year; and at least one night out a week for teenagers.'

– Shaw, 1988, p. 29

As Sen famously pointed out, we do not want to call someone poor just because he can only afford to buy one Cadillac a day when others can buy two.

Shaw's main concern appears to be that if relative poverty is treated as a form of poverty equivalent to absolute poverty then programmes to bring people above the relative poverty line into lives of comfort may seem to be of similar moral weight to life-saving programmes to relieve global absolute poverty. Hence her position seems to be to try to undermine the notion of relative poverty so that efforts will be concentrated on absolute poverty.

Hull's response is to argue that while absolute poverty has greater moral importance than relative poverty, this does not mean that relative poverty is unimportant:

Both concepts ... articulate important intuitions with regard to different sources of human hardship. They do not need to be mutually exclusive. We can concede that, given the greater severity of hardship, the claims of the absolute poor should outweigh the claims of the relatively poor. However, this is not to deny that relative poverty exists and, while its alleviation is less urgent than the alleviation of starvation and death, it is urgent nonetheless. Indeed if we were unconcerned with what quality of life human beings can and should enjoy, saving life itself would seem to lose much of its motivation.

– Hull, 2007, p. 11

However, a more direct response is also available. Brian Barry writes:

I do not deny that poverty, defined as lack of basic necessities, is a great evil ... I want to insist, however, that the whole idea of a standard of poverty unrelated to the incomes of others is nonsense ... Becoming relatively worse off can make you absolutely worse off in terms of opportunity and social standing.

– Barry, 2005, pp. 172–3

Following this insight, Barry suggests a definition of poverty which in fact is very close to one form of conventional measurement:

One modest way of [defining poverty in relative terms] is to define the poverty level as half the median income in society ... The rationale is that you are not excluded if the people in the middle of the income distribution have only twice as much as you have.

– Barry, 2005, p. 174

Barry is, in effect, repeating a point famously made earlier by Amartya Sen: that the debate reflects a confusion between merely achieving relatively less than others, and, more significantly, achieving absolutely less because of falling behind (Sen, 1983, p. 153).

[T]he contrast between the absolute and the relative features has often been confused, and I shall argue that a more general question about ascertaining the absolute standard of living lies at the root of the difficulty. In particular, it will be claimed that *absolute* deprivation in terms of a person's *capabilities* relates to *relative* deprivation in terms of commodities, incomes and resources.

– Sen, 1983, p. 153

Sen uses two similar examples from Adam Smith: the lack of leather shoes or a linen shirt, to illustrate the idea of the importance of having what one needs to appear in public without shame. Although one could not say that a

linen shirt is an absolute need in itself, not having one when others expect you to do so causes an absolute disadvantage – feeling ashamed in public (Sen, 1983, p. 159). If we think that avoiding shame and feeling accepted by others is needed to avoid absolute poverty – in Sen’s terminology, is a ‘basic capability’ – then we can see how relative deprivation in the ‘space of commodities’ (a shirt) can lead to absolute deprivation in the ‘space of capabilities’ (the capabilities for self-respect and inclusion).

Indeed, we can push this further. In contemporary society one can survive, in a physical sense, perfectly well without a smart set of clothes. Yet turning up for a job interview in worn-out jeans and an old T-shirt will generally considerably lower one’s chances of a job. And without a job, in those societies without social protection, one’s survival may become threatened. Hence not having what others take for granted can both be shaming in itself and also lead to substantively detrimental consequences. In different social circumstances ‘a different bundle of commodities and a higher real value of resources fulfill ... the *same* general needs’ (Sen, 1983, p. 161). The need to fit in is universal, but what it costs to fit in varies from society to society and time to time.

Positional goods

It is also worth picking up two further points made by Brian Barry. One is that the issue of poverty definition, and even more so remedial policy, is greatly complicated by the existence of positional goods: goods the value of which at least in part depends on how many other people have access to them. Pure status goods are an example. Goods with overcrowding effects are another (holidays in unspoilt locations). And a third is goods that act as a ‘filter’ to provide access to another good: a higher education as a route to a desirable job is a common example. For as long as positional goods exist, and have an importance to opportunity and social standing, it is very hard to see how relative poverty can be overcome. For example, as Danny Dorling emphasises, in today’s Britain, not being able to afford to take an annual holiday is taken as a sign of poverty or deprivation (Dorling, 2011). But suppose that as a result of economic growth and redistribution, in ten years’ time everyone who wishes to is able to do so. It is possible that under such circumstances going on holiday will be taken for granted, and taking a holiday abroad will become the new aspiration. And once that level is achieved for everyone a new norm evolves. In this example, a holiday has taken on the role of a status good (one form of positional good) and a status good, in its very nature, loses its point as a status good if it is enjoyed by everyone. Much as one would wish for the demise of status goods, for as long as they exist it is very hard to see how relative poverty will be avoided: those who lack the status goods of their society will suffer from a form of exclusion, and although any individual may manage to raise his or her position by obtaining the right status good, for society as a whole there will always be a moving target.

Asset poverty

It is typical to define poverty in terms of income, yet:

Even those who believe social justice to be concerned only with poverty should take into account asset poverty as well as lack of income. Almost 40 percent of the American population would not be able to survive on their financial assets for three months at the poverty level.

– Barry, 2005, pp. 187–8

This point is well made by the Joseph Rowntree Foundation too:

Low income is just one indicator of poverty. A fuller picture looks at all resources, not only income. This can include access to decent housing, community amenities and social networks, and assets, i.e. what people own. Somebody who lacks these resources can be said to be in poverty in a wider sense.

– Joseph Rowntree Foundation, 2009, p. 19

John D. Jones's approach

While we have made the point that there is no major contemporary political philosopher of poverty, there are a number of recent works which have directly addressed the issue, including the substantial work of John D. Jones. Jones is a philosopher and theologian (an ordained priest) at Marquette University, which is a Catholic and Jesuit University. In 1990 he published *Poverty and the Human Condition: A Philosophical Inquiry*, with the minor publishing house Edwin Mellen Press. Jones begins by claiming 'This study offers, so far as I know, the first full-scale philosophical investigation into the meaning of poverty' (Jones, 1990). Yet with the partial exception of Richard Hull (where reference to Jones's work was found) and H. P. Lotter (see below), Jones's book has been barely cited in the philosophical literature. Jones combines a broadly Heideggerian approach to the analysis of poverty with reference to the Christian tradition, but he is equally aware of the work of Sen and debates we have rehearsed above about relative and absolute poverty.

Jones's perspective, however, makes him open to insights that are less common within more analytic traditions, not only emphasising the Christian praise of poverty, which sees poverty in a positive light, but also, in Heideggerian terminology, writing:

Let me begin by developing a distinction ... between being-in-poverty (where poverty is an actual condition of human life) and being-toward-poverty (where poverty is understood as a possibility for human life) ... If one focuses on poverty as an actual condition in which people live, it is clear that poverty is not constitutive of human existence ... This situation changes, however, if one understands poverty as a possibility of human existence, by which it is designated (a) factors within the world that threaten to impoverish us and (b) a manner of existing into which we can fall or to which we will continue to be subjected ... [E]veryday poverty in both its forms is a possibility for human life given the condition of human existence in the world.

– Jones, 1990, pp. 15–16

Philosophically, this is a very insightful point, refusing to draw a firm boundary between the poor and non-poor, correctly pointing out that anyone is at risk of falling in poverty, whether through structural economic factors, such as a major recession or a war which can affect millions of people, or through much more personal factors such as the death or illness of a main income earner, or divorce, and so on. Like Alasdair MacIntyre, who also writes from a perspective influenced by religion (MacIntyre, 2001), Jones wishes to emphasise the essential vulnerability of all human beings.

From a policy perspective Jones's point is critical. If correct, it shows that all human beings have an interest in putting in place measures that provide protection from poverty or at least mitigate its effects. Few can rely on personal safeguards. Even savings depend on the financial security of the institutions or instruments on which people rely. Indeed, as Seebohm Rowntree points out, not only is poverty a perennial threat, but also many people will cycle in and out of poverty at different life stages (Rowntree, 1908, pp. 136–7).

Charles Karelis's perspective

A contrasting perspective comes from another philosopher, the American Charles Karelis, who in his 2007 book *The Persistence of Poverty* explicitly raises the question of whether poor people stay poor or whether the poor are a shifting population. Basing his work on the USA he suggests that people born into poor families are likely to stay poor. 'Children born in the lowest 10 percent of families ranked by income have a 51% chance probability of ending up in the lowest 20% as adults.' (Karelis, 2007, p. x). Although Karelis is a philosopher, his main interest is a combination of an economic and psychological argument to explain the persistence of poverty. We will summarise his thesis shortly, but prior to that we should draw out some of his claims about the definition of poverty. He adds an important further clarification concerning the material nature of poverty. Recalling that many define poverty in purely physical, or physiological, terms Karelis observes:

Poverty is ... essentially a lack of physical resources, but it is not necessarily a matter of unmet physical needs. Rather, poverty is having insufficient material resources to meet all basic needs, whether these basic needs stem from our animal nature or not.

– Karelis, 2007, p. 3

He adds that the relevant basic needs are those that are typical for society, rather than tailored to individual variation (Karelis, 2007, p. 7). These always have to be relativised to a particular society: given variation between cultures and over time there is no justification for taking any particular standard and inscribing it as universal.

The main theme of Karelis's book starts by claiming that a number of behaviours typically characterise the poor, including:

- not working much for pay;
- not getting much education;
- not saving for a rainy day;
- abusing alcohol; and
- taking risks with the law.

– Karelis, 2007, p. 13

These claims are contentious if considered as a wide generalisation. The 'working poor' is recognised as an increasing phenomenon in the UK, and a study in 2012 found that more people in poverty live in working households than workless households, if pensioners are excluded (Joseph Rowntree Foundation, 2012). This is nothing new. For example, contrary to Karelis, Seebohm Rowntree's pioneering study of York in 1899 revealed that many people in poverty were in work and drank little, and some did have savings,

though often they had little education. Interestingly, Rowntree makes very little mention of criminality, except to compare the diets of the poor with those provided to prisoners (Rowntree, 1908).

Karelis's question, though, is why poor people persist in these behaviours when changing them would considerably improve their position. Karelis notes that standard explanations fall into two groups. The first claims that the poor are in some respect irrational: they are apathetic; or have limited time horizons; or suffer from weakness of the will. The second group appeals to rational factors, such as opportunity constraints, atypical preferences or perverse incentives created by welfare structures.

Rejecting all of these as complete explanations, Karelis proposes the novel thesis that the behaviours that poor people exhibit and keep them poor can be explained if we understand that the economic dogma that all goods yield increasing marginal returns is false. In essence, Karelis argues that above a certain level of sufficiency extra goods do indeed yield diminishing marginal returns, but below sufficiency, goods have increasing marginal returns to scale. For a famished person a second portion of food is more valuable than the first, if the first portion will still leave the person hungry. If so, it may be better to eat well every second day than to eat unsatisfactory amounts of food every day. The startling conclusion is that when goods yield increasing marginal returns the sporadic working and consumption patterns that characterise the behaviour of the poor turn out to be more efficient than 'smooth' working and consumption patterns. In essence, then, poor people have to be removed from poverty for it to become efficient for them to stop behaving in the damaging ways that keep them poor. According to this view, poverty persists because it is a rational response to insufficiency. This is essentially a combination of a psychological and economic theory rather than a philosophical one, and commenting on it further is beyond the scope of this review, though it should be noted that it is a highly interesting and original, though controversial, position.

H. P. Lotter's contribution

The most significant recent contribution to the philosophical literature is the 2011 book by the South African philosopher H. P. (Hennie) Lotter, which builds on his earlier work. As a South African, Lotter is able to integrate concerns about domestic and global poverty into a single study. He makes the interesting observation that poverty seems to be a distinctively human characteristic. Badly kept zoo animals might suffer from cruelty or neglect but not poverty. Wild animals starve but do not live in poverty. Poverty, thus, seems to be related in some way to humanity, and clearly is also an evaluative property: poverty is undesirable and negative. Lotter is particularly keen, like Rowntree, to relate poverty to the requirements of a life lived in good health (Lotter, 2011). However, Lotter does not find the distinction between absolute and relative poverty helpful, as he agrees with the point noted above that according to most interpretations a relative element enters into the definition even of absolute poverty. At a minimum, for example, differences of climate will mean that different levels of resources will be needed to stay alive. Hence the ambition of an absolute standard to provide a universal standard (if it is the ambition) fails. What is needed to avoid absolute poverty varies (Lotter, 2011, p. 29).

Lotter introduces, instead, a distinction between 'extreme' poverty – lacking the economic capacities to sustain physical health – and 'intermediate' poverty, which 'is demarcated by the loss of human dignity

a person suffers as a result of their inability to engage in typically human activities defined as necessary for a normal, decent human life as specified by their society' (Lotter, 2011, p. 35). He further points out that in difficult times, a large number of people could suffer from intermediate poverty in this sense (and therefore defining relative poverty in relation to median income is problematic). It also follows that intermediate poverty is, in principle, avoidable (although as we saw the problem of positional status goods may make it in practice impossible to avoid intermediate poverty for all). Nevertheless, Lotter's definition is resistant to the criticism that it confuses poverty with inequality, as he does not define intermediate poverty in terms of a person's place in an income distribution, unlike standard measures of relative poverty.

Wolff and de-Shalit and the measurement of poverty

Given their lack of attention to the notion of poverty, it is little surprise that philosophers have not commented a great deal on the issue of the measurement of poverty, beyond the type of comment we saw from Brian Barry. One exception to this is the work of Wolff and de-Shalit (2007), who discuss a problem in the measurement of poverty, not because their analysis had a central place for poverty, but to raise some more general difficulties about measurement. They note that in an important study Bradshaw and Finch used three different measures of poverty: income, standard of living and the subjective measure of feeling poor. It is remarkable that there is less overlap between these three measures than might be assumed in advance. It is possible to feel poor, but have what is regarded by others as an adequate income and standard of living, for example, and all combinations of performance above or below a threshold on each measure can be found. In view of this, how should poverty be defined?

Wolff and de-Shalit note that the Bradshaw and Finch work picks two objective measures and one subjective one. The problem with purely objective measures is that they may fail to take into account the special circumstances (for example, very expensive needs) of an individual. The problem with purely subjective measures is that they may reflect 'adaptive preferences' (people fatalistically adjusting to difficult circumstances) or 'expensive tastes', which arguably should not give rise to claims on others. In the light of these arguments Wolff and de-Shalit speculatively suggest that a person should be defined as 'poor' if they are poor on at least two criteria. For example, someone may have a low income and a low standard of living but not feel poor. While of course, individuals may choose an ascetic lifestyle, it may well be the case that someone in this situation is experiencing adaptive preferences. A second case is someone who has a low income and feels poor but has an acceptable standard of living. It is very likely that someone in this situation will be running down savings, relying on insecure financial assistance of others, or building up debt. In each case, the person is in an unsustainable position which may well lead to crisis. Finally, think of someone with an adequate income but low standard of living and who feels poor. Here, the most likely scenario is someone who has large financial demands, possible debt service, expensive medical needs, or large numbers of dependents. Hence 'two out of three' is likely to reflect some special case of poverty. These points remind us, as does the Rowntree approach to poverty, that income measures need to be supplemented by wider consideration of asset ownership (or debt) and need.

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7 CONTEMPORARY PHILOSOPHICAL ANALYSIS OF POVERTY AND GLOBAL JUSTICE

In contrast to the few direct philosophical contributions to the discussion of poverty in a domestic context, there is a large philosophical literature that addresses global poverty. Even if domestic poverty is our primary concern, it is useful to explore this literature. However, in doing this, do we make domestic poverty seem much less pressing and significant?

It would be impossible to survey all the writings on poverty in a global context within the scope of this review, from Peter Singer's seminal paper 'Famine, Affluence and Morality', published in 1972 and beyond. We will take as representative one key source: the recent collection *Freedom From Poverty as a Human Right* edited by Thomas Pogge, a key figure in this literature. Themes emerging from this collection are:

- the definition of poverty;
- the wrong of poverty;
- whether human beings have a human right to freedom from poverty;
- where the duty to relieve poverty falls; and
- whether the duty to relieve poverty is one of justice or charity.

The definition of poverty

This collection focuses on what Pogge calls ‘severe poverty’ (Pogge, 2007a, p. 2), which he regards as a form of absolute poverty, and related to the UN definition of ‘extreme poverty’ defined as those for whom ‘a minimum, nutritionally adequate diet plus essential non-food requirements are not affordable’. Pogge’s notion of severe poverty includes ‘those in constant peril of being unable to meet their basic needs’ and, he suggests, half the world’s population are in this position.

Most authors in this collection assume a ‘dollar a day’ or ‘two dollars a day’ at the Purchasing Power Parity (PPP) definition of poverty without deepening the analysis. There are some remarks about the definition of poverty; for example, Tom Campbell suggests that social exclusion, in the form of being discriminated against, despised or disrespected, is a consequence of poverty, rather than part of the definition of poverty, and thereby insists on a relatively narrow definition (Campbell, 2007). Fleurbaey, in contrast, seeks to widen the definition, arguing that poverty is not just about having less in quantitative terms, but also involves a qualitative difference, such as fear of the future, shame, lack of control over destiny, or submission to the arbitrary power of a boss or civil servant. Poverty may involve painful working conditions, humiliation, low wages, and reluctantly purchasing goods that are low quality, unhealthy, cheap or unethically produced (Fleurbaey, 2007).

The wrong of poverty

Campbell interestingly reflects on the ‘wrong of poverty’ suggesting that there are two ways to see the wrong of poverty. One is that it is an evil experienced by the poor: suffering, hunger, sickness or death. The other is that it is an injustice deriving from relationships between the poor and the affluent (Campbell, 2007). This is important because it relates to the central question of Pogge’s edited volume: whether freedom from poverty is a human right, and whether the duty to alleviate poverty is one of charity or justice. Both of these issues will be discussed in more detail.

Whether human beings have a human right to freedom from poverty

The collection, not surprisingly given its name, focuses primarily on the question of when poverty is a human rights violation. It may seem a simple matter to argue in favour of a human right to be free from poverty. The advantages of doing so are evident: the rhetorical and argumentative force of a claimed human rights violation is probably higher than the other appeals to justice or moral duty. Yet the moral case needs to be made, as it is, for example by Tasioulas, basing his analysis on an ‘interest theory’ of human rights, in the sense that rights protect human interests in such things as security of person and property, and the need for a good human life. He argues, very plausibly, that poverty involves material deprivation at a level which threatens a number of interests (Tasioulas, 2007). Yet at the same time the interest theory of human rights has been questioned: not all interests generate human rights. Few would deny, for example, that human beings have a fundamental interest in being loved, but few would argue that we have a human right to be loved.

There is, fortunately, a substantial philosophical literature that bears on this issue. Henry Shue's hugely influential book *Basic Rights* argues for three basic (human) rights: the rights to liberty, security and subsistence (Shue, 1996, p.9). Shue defines subsistence as:

[U]npolluted air, unpolluted water, adequate food, adequate clothing, adequate shelter, and minimal preventive public health care ... [T]he basic idea is to have available for consumption what is needed to for a decent chance at a reasonably healthy and active life of more or less normal length, barring tragic interventions.

– Shue, 1996, p. 23

Shue's argument, essentially, is that liberty, security and subsistence are prerequisites of the enjoyment of any other rights, and hence deserve to be called 'basic rights'.

However, it is less clear how and when such a right is violated. Pogge points out that it is not a straightforward matter because the causation of poverty is not always apparent, and, unlike torture, for instance, it may be very difficult to identify an agent responsible for another's poverty unless the government has undertaken a deliberate programme of victimisation or discrimination, as is sometimes the case with respect to ethnic minority groups (Pogge, 2007b). However, there are many cases in which government action can have a predictable effect on poverty through such devices as minor variations in a country's tax laws, labour relations, social security, or access to health care or education. Hence Pogge concludes that governments can violate human rights to be free of severe poverty when institutions foreseeably, and reasonably avoidably, produce an excess of severe poverty through government policy, even if creating poverty was not the explicit aim of policy. And indeed Tom Campbell points out that governments do have the means to mitigate severe poverty by such measures as withdrawing legal recognition of the debts of the poor, or, more obviously, taking on positive duties of support through economic and welfare policies (Campbell, 2007).

Finally, there is a question of enforcement. Even if it is established that there is a clear violation by a government of the right to freedom from poverty, there remains the question of what can and should be done about it: how can human rights be enforced? At present there is no legal mechanism by which violations of economic, social and cultural human rights can generally be enforced. Nevertheless, there are methods of soft enforcement: such as diplomatic correspondence, public shaming and trade sanctions. In the case of poverty, however, the most appropriate response will generally be assistance.

Where the duty to relieve poverty falls

The previous discussion raises the independently important question of where the duty to relieve poverty falls. It is discussed along familiar lines from the point of view of human rights theory. According to one viewpoint, advanced by Campbell, the duty falls on everyone in proportion to their capacity to help, albeit enhanced by the role one may have in contributing to poverty (Campbell, 2007). In another view, supported by Wenar, the primary duty lies with the individual themselves, and then the family or community, and then the state in which the citizen resides, with people in other states having a duty to assist only when the state in question fails

in its duty (Wenar, 2007). However, as Ashford insists, where institutional arrangements are not in place, the duty must fall on all individuals who have the duty to do their fair share to relieve poverty (Ashford, 2007).

Yet the matter is more complicated in at least one respect. A developed country may have a duty to assist the impoverished citizens of burdened countries elsewhere on the globe, but it also has duties to assist the poor within its own borders. Especially in times of economic hardship this may create a 'conflict of duties', and a government may face political pressure to assist the poor in its own country before assisting the poor elsewhere. Such concerns were in part at least behind Brenda Shaw's objection to the notion of relative poverty: that if citizens at home and abroad are equally thought to suffer from poverty, it would normally be expected that any government must give priority to its own citizens first (Shaw, 1988).

Whether the duty is one of justice or charity

One question that is raised with regards to global poverty, which also emerges in the domestic sphere, is whether our duties to the poor are duties of justice or charity. The debate centres on the idea that only among certain types of relations do considerations of justice arise. Some contributors to the debate argue that only in a nation state do relations to which considerations of justice apply exist, and not beyond it.

As there is a forceful attempt by some to argue that duties of justice should apply across the globe, there is a strong onus on those in opposition to set out exactly what it is about the relations within a state that makes justice applicable within, but not beyond it. Different answers have been suggested. For example, some say that what is significant about relations within a state is that they are coercive (Nagel, 2005), others, that they are reciprocal (Sangiovanni, 2007). Some also emphasise the cooperative nature of a state (Rawls, 1999) and others relate our obligations to the social contract.

Whether or not the duty is one of justice, there is a moral duty to help if someone is badly off. But a duty to alleviate poverty can be a duty of justice or a duty of charity, and it may be thought to make a difference which one it is. Some claim that duties of justice are more stringent than duties of charity. Some insist that the only distinction between duties of charity and duties of justice is that the latter are perfect duties. A perfect duty is one for which we are able to specify what it is for a duty to be fulfilled. This is significant, as there is no upper or lower limit on what complying with what an imperfect duty requires. In this way there is a difference in stringency between duties of justice and charity. It is hard to say that someone has under-fulfilled their imperfect duty of charity. Any contribution may be regarded as fulfilling a duty of charity. However, in the case of duties of justice, it is possible to state what is required and show that one has failed to meet this standard.

One of the dominant lines of thought within the debate on global justice is that members of affluent states owe duties of justice to the poor because they harm them (Pogge, 2007b). Pogge's view harnesses empirical evidence regarding global decisions and actions by powerful global agents, such as states, corporations and intrastate bodies, taken to benefit their own interests at the expense of the interests of poor countries. From this it would follow that we have duties of justice to rectify harms to the poor: a position which, if properly evidenced, both egalitarians and libertarians would agree with. This is a very different approach to that taken with regards to our duties to our fellow citizens. Within the liberal (as distinct from Marxist)

tradition, it is rarely suggested that the wealthy have duties to those worse off than them because the affluent members of society harm the poor. This may be because this claim cannot be supported empirically, or because it is much more forceful to base our duties on other grounds.

Nevertheless, there are stories we could tell about interactions within a state that could support the idea that the wealthy members contribute to the worsening situation of the poor. For example, wealthy members of society can use their leverage to lobby for tax cuts, which may perhaps result in lower public spending. They may drive up prices, such as property prices, which out-price poorer members of society. Wealthy members of society may encourage the privatisation of services, which leads to a two-tiered system of service provision, with the wealthy enjoying higher standards of private services, especially education and health care, which compound their advantages while the poor must make do with lower standards of services.

Conclusion

The key issue is whether taking steps to deal with domestic relative or intermediate poverty can be justified when there is much more urgent, extreme or absolute poverty elsewhere in the world. Some have suggested that it is a type of national selfishness or self-indulgence to favour our own citizens who are in less need than others elsewhere. One response is to argue that while we have duties of justice to fellow citizens, our duties to those outside our borders are less stringent duties of charity or humanity. However, the distinction is contestable and even if we have only a duty of charity to non-nationals, we may still prioritise them because they are in a more urgently needy situation. In the abstract, it is very hard to see how it is acceptable to prioritise the alleviation of relative poverty in one country when there is severe absolute poverty in another. However, the logic of this argument is very far reaching: it is harder still to see why a country should subsidise opera when people in another country are starving, or indeed, people in its own country are homeless or finding it difficult to feed themselves. Attempting to answer these questions is beyond the scope of this review, but we raise them in order to draw attention to the difficulty of the questions of prioritisation.

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8 OTHER CONTEMPORARY EGALITARIAN THOUGHT AND ITS BEARING ON POVERTY

The absence of explicit accounts of poverty in the works of contemporary political philosophers does not mean that their work cannot illuminate issues relating to poverty. In this section we will look at some leading political philosophers and explore the relevance of their work to the issues that concern us. Rather than survey thinkers one by one, we pick out common themes from their work, though necessarily the approach is selective rather than comprehensive.

Poverty and the ‘pattern’ of justice

The question of the ‘pattern’ of justice is relevant to the question of whether poverty should be defined in terms of falling below a ‘poverty line’ and if so how it should be set. Most contemporary political philosophers, with some notable exceptions, hold that justice in some sense requires equality. However, within the egalitarian tradition an important question has been raised about the extent to which egalitarianism requires an equal division of resources (with the implication that anyone below the line of equality in some sense suffers from poverty). In some accounts, justice requires equality because equality itself matters. Yet critics have pointed out that if equality in

distribution is what matters then it should be preferable to accept equality at a low level rather than a society of inequality which makes everyone better off, all things considered, through, for example, allowing incentives to increase economic activity to the benefit of all but some more than others (the 'levelling down objection') (Parfit, 1998). Such critics have suggested that our real concern as egalitarians is either that each person has enough – the 'sufficiency' view (Frankfurt, 1987), of which the 'unconditional basic income' view is an important variant (Van Parijs, 1992, 1995), or that we give priority to the worst off – the 'priority' view (Parfit, 1998).

The levelling down argument is not conclusive. Some claim that equality matters because people need to have equal status to achieve justice. Limiting the resources of the better off, perhaps as a result of not allowing those with more talents to be offered special incentives to make the best use of them, may be justified by the resulting increase in the status of the worst off. Nevertheless, the strict egalitarian position is now relatively rare in the literature, with many thinkers adopting some form of sufficiency or priority view, or a combination.

On the face of it, the sufficiency view would appear to support a concern with absolute poverty. The idea, defended in the recent literature by Harry Frankfurt, but also with affinities to Martha Nussbaum's view explained previously, is that justice requires that everyone has enough, rather than that everyone has the same amount. Hence there is a sufficiency line, just as there is a poverty line, and there is no difficulty in principle in the idea that all can cross that line, even in a society of great inequality, if there is general affluence. However, there are two caveats. First, defenders of the sufficiency view make clear that they believe the sufficiency threshold is far above any poverty line. Second, a sufficiency threshold could require a relative element, just as we have seen in the accounts of poverty discussed in earlier sections, which is one reason why the Joseph Rowntree Foundation regularly updates its Minimum Income Standard (Joseph Rowntree Foundation, 2014).

If the sufficiency view appears to support a concern with absolute poverty, the priority view seems closer to some accounts of relative poverty: what matters is not how people do in absolute terms, but rather how they do in comparison to others. On some versions of prioritarianism, it appears we still have a moral imperative to improve the position of the worst off even in highly affluent societies. This appears to be a consequence, for example, of Rawls's 'difference principle' according to which we have a duty to make the worst off as well as possible, apparently without qualification (Rawls, 1971). Deviations from equality are permitted as long as everyone benefits, especially the least advantaged, as they might do, for example, from a growing economy. In other versions of the priority view, the imperative weakens and then disappears the richer the society becomes (Parfit, 1998). However, according to this view too a caveat is necessary. No theorist seems to make the claim that the worst off are necessarily in poverty, and hence in this case our duties go beyond confronting poverty.

The implications of poverty

By raising the question of the 'implications of poverty', we are asking in what way or ways it is bad for a person to be in poverty. Obviously, this will depend on the theory of poverty in question: according to standard theories a person would not be able to meet their basic needs, or would be excluded from taking a normal place in society. Taking Rawls's view as an example, one of the primary goods is the 'social bases of self-respect' (Rawls, 1971). Those

in poverty may be less likely than others to be able to access the resources and achievements that facilitate self-respect, which for Rawls means being secure in one's own conception of the good and the pursuit thereof. People in poverty may be less secure in their conception of the good and the pursuit of it. One reason might be that the conceptions of the good valued by a society might be those that people living in poverty cannot achieve, such as owning one's own property, going on holiday, eating a certain type of food and so on. Hence one can see the concern with the distribution of the social bases of self-respect as also a concern with relative poverty.

Rawls's last book on distributive justice, *Justice as Fairness: A Restatement* (2001), has a section entitled 'Who Are The Least Advantaged?' Here Rawls explains a modification in his account of primary goods that he had started to develop within a few years of the first publication of *A Theory of Justice* in 1971. In addition to being 'all-purpose means' to pursue individuals' conceptions, of the good, the primary goods are now also conceived as the means to 'develop and fully exercise the two moral powers' (Rawls, 2001, p. 57). A full examination of this idea is outside the scope of this report, but it is related to the idea of fulfilling one's role as a citizen who is a fully co-operating member of society (Rawls, 2001, p. 58). Primary goods are conceived of as 'citizen's needs'. Those in poverty would have more difficulty than others in acting as citizens, helping others and taking part in the political process, for example.

Personal responsibility for poverty

While everyone can agree that poverty needs to be rectified, there is substantially less agreement about whose responsibility it is to do so. For many, the crucial question is how poverty has come about. In one common view those who are in poverty through no fault of their own have a claim in terms of justice on the rest of society, whereas it is not seen as an injustice if people are in poverty due to free choices they have made. This is often the shape of the debate about welfare policies in our society. Some people object to being taxed for the sake of the unemployed because they claim they have worked hard to make their money, and it is unfair to have to give over a portion of this to those who have not worked as hard or made the same sacrifices. Underlying this is the thought that we should face the consequences of our decisions: I should be able to benefit from my efforts, and others who have refused to make similar efforts and sacrifices should not be rewarded.

The idea that what matters is our choices underpins a prominent line of egalitarian thinking, commonly known as luck egalitarianism. According to some thinkers, it is unjust if some people are worse off than others due to these unchosen factors, and so a theory of justice should aim at correcting inequalities due to mere bad luck (Dworkin, 1981b). According to this theory justice requires correction for unchosen bad luck, but not for the results of free choice. Bad luck could include having few talents or a disability. Indeed, people may even lack the ability to work hard due to unchosen factors such as the family into which they were born, the attitudes of their teachers and school, or the absence of mentors or role models.

How exactly to draw the distinction between freely made choice and bad luck has attracted much debate (Dworkin, 1981b; Arneson, 1989; Cohen, 1989). Not all apparent choices are equally free. People in urgent need, rushed for time and lacking information, do of course make choices, but whether they should always be held responsible for choices made under such

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circumstances is controversial. In fact, the great majority of luck egalitarians propose that people should only be held fully responsible for their choices when fair background conditions (including material equality) is in place. In other words, luck egalitarianism is typically offered as a form of 'ideal theory'.

In this way we can see that luck egalitarianism is not applicable in an unmodified form to the conditions of the world as it is. Indeed, working out a theory of responsibility for the real world is fraught with difficulties. On the one hand, given the difficult circumstances under which many people make their choices, it would seem wrong to require that all individuals, especially those at risk of poverty, should be held responsible for the full consequences of their choices. On the other hand, it would seem demeaning to say that those in poverty are never responsible for the consequences of their choices. In some cases it may seem appropriate that poor individuals share the costs of their adverse choices even if society as a whole also shares in and mitigates the consequences (Wolff and de-Shalit, 2007).

Nevertheless, luck egalitarianism helps make the case that very often there is a duty of justice for the state to help alleviate poverty. If someone is in poverty for reasons outside their control, such as having a disability, or having low skills that cannot command a high wage in society, there is a claim against society, according to luck egalitarianism. On the other hand, it also supports the idea that we do not have duties of justice to help people out of poverty when they can rightfully be held fully responsible for their situation, if they have made choices that have led to poverty, for example, frittering away their money, or choosing not to work (although a compassionate society may still choose to help). It makes our duties of justice dependent on the matter of personal responsibility, which seems to accord with prevailing views in society. The luck egalitarian view captures the way our society approaches poverty, yet takes a more sensitive approach in judging when a person should be helped as a matter of justice, when a person is not responsible for their situation. Yet there are many difficulties with the theory, and it may seem that despite the way we tend to make judgements in society, the question of personal responsibility and free choice should not determine people's entitlements to support, and that instead a theory which advocates a social minimum for all, such as basic income theory, or redistribution regardless of personal responsibility, could be preferable. Indeed, many luck egalitarians supplement their theories with a secondary principle that guarantees that no one should fall below a basic level, whatever their responsibility for their own choices (Segall, 2010).

Why is poverty wrong?

The discussion to this point raises the morally vital question of why others should care that some are in poverty, and feel obliged to take steps to relieve that poverty. One account, as we saw above, appeals to the duties of justice that apply to the correction of undeserved bad luck. However, most accounts that directly address poverty, in one way or another, appeal to our common humanity, sometimes put in terms of the idea that we all face the risk of becoming poor, and so all have both an other-regarding concern and self-regarding interest in the prevention and relief of poverty (Jones, 1990). The affront to the dignity of the poor is also emphasised (Lotter, 2011).

It is worth raising the question of why it is that poverty is a particular responsibility of governments. One possibility is that as individuals we have a moral responsibility to the poor and we delegate this obligation to the

government. However, another approach suggests that governments have a special responsibility beyond the transfer of individual responsibility.

One such approach comes from Joseph Raz, who argues that political authorities are legitimate only when they increase the well-being of persons subject to them (Raz, 1986). Well-being, for Raz, consists in persons realising valuable goals – projects, plans, relationships, ambitions, commitments and so on – which they willingly endorse. For Raz, a person's well-being can only be improved by helping her to achieve her goals, or by helping her to have certain goals, and not by achieving those goals for her. Political authorities are required to improve the well-being of their citizens by helping them to achieve valuable goals.

In societies with a culture of autonomy, such as our own, Raz further argues that to increase the well-being of its citizens, governments and institutions are required to promote and protect political freedom. The goals to achieve the realisation of people's well-being, Raz argues, must be based on existing social forms. This is especially the case for comprehensive goals – those that permeate all aspects of life. In an autonomy-based culture, improving people's well-being requires protecting and promoting the conditions of autonomy, so that people's goals can be based on existing, autonomy-based social forms. To be autonomous, Raz claims, is to be part author of one's life – to have chosen the goals and projects which one willingly pursues. The conditions of autonomy therefore consist of the ability to choose goals, the independence to do so, and an adequate variety of options to choose between. To ensure that citizens exist within these conditions is to protect and promote their political freedom. In autonomy-based societies, Raz concludes, political freedom is of intrinsic value.

Since political authorities are required to increase the well-being of their citizens, in an autonomous-based culture they are required, first, to help citizens to achieve valuable goals, and second, to promote and protect political freedom. Both requirements support a more specific duty to alleviate and avoid poverty, although Raz does not spell out how they would do so.

We would suggest four reasons that people in poverty would experience a lack of well-being in line with Raz's theory, and hence that governments would have a duty to combat poverty (these reasons are not suggested by Raz himself but are consistent with his theory):

- When people lack external means or resources, such as money or public services, which make it impossible or very difficult for people in poverty to achieve the goals that they have (or to sustain or increase their means or resources in a society where this is required, such as our own).
- More controversially, it could be argued that as a result of living in poverty individuals may come to lack what might be called internal means or resources, such as confidence, knowledge, status, and, for those raised in poverty, education, which makes it impossible or very difficult for people in poverty to achieve the goals they have, to access services or use the money they have to achieve those goals.
- More controversially still, people in poverty may, as a consolation, have and pursue goals that, according to Raz's theory, are not valuable, such as serious drug use, which for Raz is as bad as not realising valuable goals. This may be a result of being less exposed than the average person to certain valuable goals, less able to grasp the reasons for endorsing certain goals, and more vulnerable to goals that are worthless.
- People may not have their biologically determined needs met, which are a part of well-being.

Raz does not spell out why people in poverty would, according to his theory, have less autonomy. The explanation must be that being in poverty undermines the conditions of autonomy: the ability to choose goals, the independence to do so, and an adequate variety of options to choose between. It is not obvious, however, how poverty could undermine a person's independence in Raz's sense of constituting coercion or manipulation. One case may be that in which poverty is so severe that a person may be thought to be coerced into a choice such as stealing. Raz seems to consider such problems under the adequacy of options, though. So we would suggest two types of reason why a person's poverty would undermine her autonomy (again, these reasons are not suggested by Raz himself but fit with his theory).

Restricting choice

Poverty often undermines people's ability to choose – to form intentions and plan their execution. Poverty, especially in the long term, may undermine some capacities that are necessary to form such intentions and plan their execution. People in poverty may have little knowledge of different goals, little awareness of how to realise them, and little confidence in their ability to do so, since the environment in which they act is insecure. These are things that others or government could help with without actually achieving a person's goal for her, thus allowing her to remain autonomous.

Few options

Poverty constitutes an inadequate variety of options for a person to choose between. A lack of means or resources, both internal and external, may result in there being few valuable options for a person to choose between, and of limited variety. On the one hand, a person in poverty may never have the time to do anything apart from work for survival and meet her more basic goals. On the other hand, all of the choices of a person in poverty may be insignificant, since her level of income does not allow her to pursue more comprehensive, significant goals. Either way, poverty appears to undermine her ability to choose and pursue comprehensive goals, and therefore to undermine her autonomy.

It follows from Raz's theory, then, that governments and other political actors have a duty to combat poverty, where this duty is based both on a duty to improve citizens' well-being and on a duty to promote and protect citizens' autonomy.

The wrongs of poverty

A useful summary of the wrongs of poverty comes from Thomas Scanlon (2013), drawing on ideas from by Jiwei Ci (2012). Those in poverty may experience subsistence poverty (close to the idea of absolute poverty), threatening their ability to meet the needs of physical survival. They may also face status poverty (close to relative poverty), making it impossible to live in the way required to be respected. Finally, they may face agency poverty (an apparently new idea) – it is impossible to have the control over their life that is expected by a normal functioning agent. The extension of Raz's theory as just explained could be understood as an exposition of the idea of agency poverty.

What should be done about poverty?

In one sense, the question of what should be done about poverty suggests its own answer. If poverty consists in lacking income and resources sufficient to meet basic needs, then it seems obvious that the answer is to increase income and wealth of poor people, presumably by taxing richer people and redistributing the wealth. However, there are at least three complications.

Structural conditions

First, there is more than one way in which an individual's income and wealth can be increased. Redistribution is an obvious strategy, but it may be better in the long term to look at deeper causes of poverty, such as lack of skills and/or lack of job opportunities, and attempt to reform the structural conditions that create poverty, rather than providing poverty relief. There are good reasons for trying to transcend poverty, instead of merely relieving it.

Costs

Second, the problem of poverty is not so much a lack of resources as a gap between available income and the cost of goods that are required to relieve basic needs. If those goods could be made available at a lower price, or, where appropriate, free at the point of consumption, then some level of poverty would be removed even without changes to income. If schools, medical care, forms of leisure and transport were made accessible at public expense or at subsidy, then incomes would be less relevant to well-being, and the poverty line could be lower. Ultimately, as Brian Barry argues, the welfare state is designed to prevent poverty rather than relieve it (Barry 1990, p. 503).

Michael Walzer develops this theme in *Spheres of Justice* (Walzer, 1983). In the chapter on 'Security and Welfare' he argues that every political community must attend to the needs of its members, as collectively understood, that goods must be distributed in proportion to need, and that distribution must recognise and uphold the underlying equality of membership. However, Walzer sees the way to address unmet needs for such things as health, education, and, interestingly, the burial of the dead, as through provision at public expense rather than the direct relief of poverty through redistribution.

Certainly, most developed societies have taken this approach with health care, unemployment insurance and pension plans. Rather than redistributing income, essential goods can be provided collectively. This is especially important when the goods represent key needs, require self-discipline to maintain payments for future services, and are not greatly subject to individual variation of taste. (Food is typically not provided by the state, even though it is a key need, possibly because food expenditure is short-term and predictable but also a very important area of personal choice.)

Relative poverty

The third complication is that attempting to deal with relative poverty can be more problematic, especially when the goods that allow one to 'fit in' have a 'positional' aspect, so that if everyone has them then another good will take on symbolic status of what is needed to fit in. Given that what it takes to fit in is a matter of cultural practice, or even counter-cultural practice, attempted government intervention in this area may well be counterproductive. Although we do not know of empirical evidence for this, there is a theoretical possibility that redistributing income to relieve relative

poverty will simply drive up the cost of status goods and have no ultimate impact on relative poverty. In such circumstances the encouragement of a diverse culture with many different ways of 'fitting in' will be helpful to give people real choices about how to spend the money they receive.

In sum, we would caution against the assumption that the only way of relieving poverty is to redistribute more income to the poor, although in very many cases this is likely to be very welcome. Other strategies, such as improving opportunities and individuals' ability to make use of them, as well as collective provision of particular goods and the encourage of a diverse culture can all make a contribution to the relief of both absolute and relative poverty.

9 CONCLUSION

In the introductory section we raised a number of questions that would frame this discussion. The questions have been addressed throughout the discussion, although not in every case directly. By way of conclusion we now summarise our answers to these questions.

What is poverty?

Although we discussed at length the proposal of Sen (and Nussbaum) that the concept of poverty should be redefined in terms of capability deprivation, we argued that this is conceptually, practically and politically unhelpful, and poverty should be restricted to forms of capability deprivation that are related to low income and wealth. Hence we are happy to endorse traditional definitions of poverty. Absolute poverty is living at such a low level of income and wealth that one's health, or even survival, is threatened. Relative poverty is living at a level of income that does not allow one to take part in the normal or encouraged activities for one's society. We also endorse Lotter's observation that poverty is a distinctively human phenomenon. Animals can be ill-nourished and poorly sheltered, but it would not normally be appropriate to talk about animals living in poverty (unless perhaps they lived in a human household that was poor).

We should note, however, that there are complications with these definitions that we have not discussed, for, as far as we know, they have not figured in the philosophical literature to date. For example, if someone has access to resources only through a demeaning activity, such as begging or prostitution, or very reluctantly through criminal actions, it still seems appropriate to describe them, in certain circumstances, as poor, even if they meet their needs for health and socially acceptable activities. A different problem, regarding relative poverty, is that many people may identify with several groups, with different social expectations. How do we classify someone who is able to meet the standards of a sub-group, but not of society as a whole?

What is wrong with poverty?

In a way the wrongness of poverty follows very easily from its definition. Human beings have vital needs for health and to be included in their social groups. People in poverty are unable to meet their needs, and therefore suffer from forms of deprivation. In addition, we endorse the observation by Lotter and Jones that poverty is an affront to human dignity. We are also sympathetic to the luck egalitarian argument that those who are in poverty through undeserved bad luck suffer from an injustice. However, the distinction between luck and choice can be very difficult to make in practice.

We endorse the observation by Lotter and Jones that poverty is an affront to human dignity.

What should be done about poverty?

Poverty is a lack of resources to meet particular needs. The obvious solution is to redistribute income. However, public provision of goods can, in some circumstances, be a better solution, as can improving the opportunities of the poor to earn for themselves through training and job creation. We noted, however, that there can be difficulties in relieving relative poverty when 'positional goods' are needed to fit in with society.

We also suggested that from an analytical point of view, it is important to ask four sub-questions:

- Is a clear, coherent, **definition** of poverty possible?

We believe so, subject to the complications set out above.

- Is the definition **descriptively adequate**, picking out only those who would ordinarily be recognised to be in poverty?

This has not been tested in detail. However, Sen's alternative definition was rejected on the grounds that it included some people (wealthy but ill, or subject to discrimination) who would not count as poor according to any ordinary understanding of the term.

- Does the definition pick out a **distinct moral** category?

This is the most difficult issue. Sen proposed a new definition essentially because poverty does not pick out a distinct moral category. The morally important category is capability deprivation, and poverty is just one cause of capability deprivation. There is nothing morally more special about lack of resources, in itself, than other causal factors that can deprive people of capabilities. Of course, in special circumstances there can be morally important reasons to pick out poverty as a special cause, if, for example it is the result of previous injustice, as in the case of colonialism. But otherwise poverty does not appear to be a distinct moral category. Nevertheless the fact that poverty is such a significant cause of capability deprivation, and that it is measurable and a possible focus for particular social policy provides, in our view, adequate justification for retaining the concept of poverty.

- What moral reasons do we have to be **concerned** about poverty?

Where people are in poverty through no fault of their own, according to many theories of social justice, there will be clear demands of justice to relieve such poverty. If people have, in some clear way, brought their poverty on themselves, the case in terms of justice may be much weaker, or even disappear altogether. Yet even in these cases there seems a strong case in terms of compassion or basic humanity to relieve poverty if it is possible to do so.

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