

## **An Embarrassment of Riches and a Surplus of Shame: *Can the Rich be Poor?***

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**Abstract:** This theoretical contribution to poverty studies investigates Amartya Sen’s work as a basis for examining poverty. Sen discusses two social capabilities, each essential to the avoidance of poverty; one is the ability to appear in public without feeling shame, the other the ability to participate in the life of the community. This essay analyzes the intricacies of using the concept of community as a reference group for judging a person’s poverty, and it compares Sen’s use of this reference group with that of Adam Smith and Peter Townsend. The essay develops a notion of the “affluent poor,” which is a logical category of the capability perspective which Sen has developed. Although the affluent poor might appear to be oxymoronic, those who embrace the capability perspective should acknowledge it as a necessary implication thereof.

**Keywords:** shame, community, capabilities, Amartya Sen, poverty

**JEL codes:** B12, B55, D31, D63, I32.

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\* I would like to thank Logan Smith for his editorial work on this piece and for suggesting the subtitle.

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*What is call'd superfluous to some degree of People,  
will be thought requisite to those of higher Quality;  
and neither the World nor the Skill of Man can  
produce any thing so curious or extravagant, but  
some most Gracious Sovereign or other, if it either  
eases or diverts him, will reckon it among the  
Necessaries of Life; not meaning every Body's Life,  
but that of his Sacred Person.*

Bernard Mandeville, *The Fable of the Bees*, Remark  
(L.)

## **I. Introduction**

Amartya Sen argues that poverty should be assessed in the space of capabilities (Sen 1992, 9; Sen 1999, 87). Whether someone has the capability to do or be *X* is often independent of whether others have the same capability. Consequently, a person who lacks a capability may be deemed deprived irrespective of the capabilities of others, that is, “without [us] having to ascertain first the relative picture” (Sen 1981, 17). This is why Sen holds that poverty has an “irreducible absolutist core” (Sen 1983, 332). Nevertheless, one’s ability to realize capabilities absolutely can, and often does, involve relativity in the space of resources, commodities or income necessary for realizing certain capabilities. This is the case for what Sen calls “social capabilities” (Sen 1985b, 670; Sen 1992, 115). One such is the capability to appear in public without shame, which, in what follows, I refer to as the *no-shame capability*. Another social capability concerns the ability to participate in the life of the community, which, henceforth, I call the *community-participation capability*. Realizing these capabilities, that is, transforming the capability into an achievement or functioning, presupposes that one “meet the demands of social convention” (Sen 1983, 335). Both capabilities therefore involve a reference group – one’s community – which is the bearer of the standards or conventions up to which one must live if one is to be a participating member of the community and to avoid shame.

In this article, I engage in the sort of “conceptual questioning” of poverty for which Sen (2006, 30) calls to accompany the empirical study and measurement of poverty. Section I investigates methodological issues which the no-shame capability engenders. Section II examines the reference group for judging whether someone meets the community-participation capability. This requires an examination of the concept of *community*, for whether one is able to participate in the life of the community depends on the relevant community’s resource requirements for avoiding shame. I examine Sen’s and Peter Townsend’s notions of community and argue that Sen takes the idea of inter-community differences in standards of shame more seriously than Townsend. Some communities have a more demanding resource requirement than others for meeting Sen’s social capabilities. Section III introduces the apparently paradoxical notion of the *affluent poor*. The affluent poor are those people who, despite being monetarily affluent, fail to meet the no-shame capability and may therefore be deemed deprived. The reason for their deprivation concerns the high resource requirement of the community in which they seek to participate. In such a community, even high levels of income and wealth are insufficient for meeting the resource requirements a person must meet if she is to participate in the life of a particular community. This combination – affluent (monetarily) and poor (according to a capability standard) – might engender discomfort amongst many people. I therefore consider various strategies for removing this discomfort, but conclude that the affluent poor is a category that one must accept if one already accepts the capability approach to poverty. This should be no embarrassment to proponents of that approach.

## II. Avoiding Shame: Methodological Issues

Sen’s no-shame capability is inspired by Adam Smith’s discussion of “necessaries” which Sen often quotes. Smith writes:

By necessaries I understand not only the commodities which are indispensably necessary for the support of life, but what ever the custom of the country renders it indecent for creditable people, even the lowest order, to be without. A linen shirt, for example, is, strictly speaking, not a necessary of life. The Greeks and Romans lived, I suppose, very comfortably, though they had no linen. But in present times ... a creditable day-labourer would be ashamed to appear in publick without a linen shirt ... Custom ... has rendered leather shoes a necessary of life in England. The poorest creditable person of either sex would be ashamed to appear in public without them (1981/1776, V.ii.k.3).

Smith draws attention to varying resource requirements for meeting the no-shame capability: the eighteenth-century day-labourer, in contrast to his ancient forebears in Greece and Rome, required a linen shirt to meet this capability. Sen stresses that a person who fails to meet the no-shame capability because, say, he lacks appropriate attire, suffers an *absolute* capability deficit. The absolute deficit in the space of capabilities involves a *relative* deficit in the space of commodities (Sen 1983, 333, 335): Smith’s day-labourer, for example, commands relatively fewer commodities (in particular, no linen shirt) than others in the same community; ridding himself of this shame would be an absolute

achievement for the labourer, the accomplishment of which would require that he pull equal with others in the space of commodities by acquiring a linen shirt.

Smith draws our attention to two dimensions along which customary differences in resource requirements for meeting the no-shame capability operate. One is *temporal*, the other *spatial*. Methodologically, we must consider each separately, although they can be combined. Purely temporal comparisons examine the way in which what is deemed a *necessity* in one and the same society changes over time. Purely spatial comparisons, on the other hand, involve two spatially separate but contemporaneous societies. Smith (1981/1776, V.ii.k.3) offers us a purely spatial comparison when he tells us that, in England, leather shoes were but, in France, were not required to appear in public without shame. If we compare two geographically separate and non-contemporaneous societies, both temporal and spatial comparison is involved, as with Smith's comparison of the ancient world (Greece and Rome) with early-modern England. I return to the notion of societies and their customary resource requirements for avoiding shame in the next section, but here I make two further methodological remarks about shame.

First, the no-shame capability differs from physically-based capabilities, e.g. the capability of being well-nourished. Whether everyone else in a person's society is half-starved or well-fed makes no difference to ascertaining whether a particular person meets the capability of being well-nourished; consequently, one need not 'ascertain first the relative picture' (Sen 1981, 17) if one is to assess this person's ability to be well-nourished. With the no-shame capability, by contrast, whether I am ashamed of myself when I appear in public depends on how others in my community appear (Sen 1992, 116); to feel ashamed of myself when I appear without a linen shirt presupposes that there are others who possess such a garment and are not seen in public without it. One must therefore know something about the relative picture if we are to ascertain whether my lacking a shirt is something which gives rise to shame. The "something" that we must know to make this judgement concerns the relative command I and other people have over resources (like linen shirts). This makes an awareness of *inequalities* in resource distribution essential for an understanding of capabilities like being able to appear in public without feeling shame (Sen 2006, 36).

The second methodological point concerns a further difference between a capability like being well-nourished and the capability of avoiding shame. The latter has a "psychological component" (Sen 1983, 335 n. 16), whereas the former does not. The difference may be expressed by saying that a person's *feelings* of shame are *constitutive* of her failure to realize the no-shame capability. That is, whatever the external judge might say ("she damned well ought to feel ashamed when she dresses like that"), one would hesitate to declare that a person fails to realize the no-shame capability if that person had no feeling of shame on account of, say, her attire. With other, non-psychological, capabilities this is not the case because the feelings of the agent concerned might be irrelevant to our assessment of her deprivation. For example, first-person reports about one's health might not be a reliable indicator of one's ability to be healthy. Sen has pointed out numerous times that people inure themselves to their state of being such that they maintain feelings of happiness and well-being despite their hardship and objective deprivation. With regard to health-related capabilities, one's perception of one's own health

and the objective indicators of one's health can diverge (Sen 2002). Similarly, one's capability to nourish oneself adequately can be misperceived by first-person reports, as Joanna Mack and Stewart Lansley illustrate with the case of "Tricia" who, in order to afford toys for her children, had reduced her food intake to one meal per day. Her self-perception of this state of affairs was that it is "just something I've got used to, you know, so I don't think I could eat every day if people put it in front of me" (1985, 95). This Stoic attitude belies the objective fact that she suffers from dizziness, most likely a consequence of eating irregularly. Cases like this should lead us to mistrust a person's expressions of happiness or desire fulfilment as bases for judgements about that person's well-being. It is, though, different with the no-shame capability for which an agent's feelings of shame are an unambiguous and constitutive indicator that the agent fails to realize the no-shame capability. One might, however, hesitate to take a person's expression of feelings of shame as a sufficient criterion for her failing to realize the no-shame capability, for only if her feelings of shame are confirmed by the judgement of others do we usually hold that a person legitimately feels shame (Elster 1999, 152-3). Nevertheless, independent of what others think or say or a person's actions, the person is master in judging his own situation with regard to his own feelings of shame in a way that he is often not with regard to his health. The medical judgement of a doctor who examines a patient and can override the patient's own assessment of her health has no counterpart when it comes to the capability of avoiding shame.

### **III. Community and Society: Standards for Avoiding Shame**

Sen's formulation of the community-participation capability as "being able to participate in the activities of the community" (Sen 1983, 336) draws on Peter Townsend. Although the two disagree about many aspects of poverty (Sen, 1985b; Townsend, 1985), both use the notion of community as a reference point for judging poverty. In what follows, I compare Townsend and Sen with regard to their respective understandings of community.

Townsend holds people to be poor "when they lack the resources to ... participate in the activities and have the living conditions and the amenities which are customary ... in the societies to which they belong" (Townsend 1979, 31, 413, 922). There exist, according to Townsend, expectations which render certain goods or "styles of life" *necessities* if one is to participate in the life of the community. What does Townsend understand by "society" and "community"?

Townsend eschews the idea of a monolithic national society which imposes the same expectations on all: "[t]here is no unitary and clear-cut national 'style of living'. Rather, there are series of overlapping and merging community, ethnic, organizational and regional styles" (Townsend 1979, 249). There exist "social sub-systems" based on ethnicity, sex, locality (urban or rural), class and religion (Townsend 1979, 554, 59, 53). A national style of life is too undifferentiated a concept to yield a coherent definition of poverty because different sub-systems have their own standards of what is necessary for participating in communal life. Hence, Townsend appears to seek a differentiated concept of community (or "social sub-systems"). Yet he is reluctant to accord too much significance to differentiations between communities. Using the example of different ethnic groups, for example, he writes that they all:

use the common system of transport, work in multiracial occupations, go to multiracial schools which broadly subscribe to national cultural values, and generally adapt in many ways to the conventions and styles of life of the national society. Many of their needs will therefore be the same as of persons who are not members of such minorities and the same as of persons who are members of other minorities (Townsend 1979, 53).

Further forces which tend to homogenize standards of necessity in society are government, churches, media, professional associations, advertisers, etc. all of which try to foster “universal” standards in their various spheres of interest; consequently, Townsend concludes, “by the nature of modern development, ‘society’ is increasingly a national rather than a regional or local society” (Townsend 1979, 922).

Townsend’s proclamations about the unity of standards for community participation in Britain of the late 1960s are less plausible than they are for many of the vastly more multi-cultural nations today, and even Britain of the 1960s was less homogeneous than Townsend suggests (Piachaud 1981, 421). Nevertheless, the nation is often taken to be the unit of social analysis to which uniform standards of necessity apply. This is exemplified in the European Union’s definition of the poor:

The poor shall be taken to mean persons, families and groups of persons whose resources (material, cultural and social) are so limited as to exclude them from the minimum acceptable way of life in the Member State to which they belong (quoted in Nolan and Whelan 2011, 4).

The scope of a member state might be of use in ascertaining resource requirements for meeting the no-shame capability when it comes to activities and customs shared by a majority of the population. But as we differentiate a member state into multiple communities, we find different customs and therefore different resource requirements for avoiding shame. These different standards engender varying resource requirements for avoiding shame which, in turn, means that a person who has an annual income of 30,000 euros might be able to meet the no-shame capability in one community, whilst the same, or even a much larger, income will be insufficient to meet the same capability in a different one.

In his effort to maintain the nation as the logical social unit for working out standards of necessity, Townsend treads the path of methodological facility: pan-national standards and expectations of necessities make the study of poverty easier, for if necessities are relative to the community a person inhabits, “a different definition of poverty is required for every ... relatively autonomous community” (Townsend 1979, 53). But methodological ease is not a good reason for conceptualizing society to be more unified in its standards of necessity than it actually is. We ought, therefore, to be wary when Townsend uses the following terms to define poverty: “participat[ing] in the activities ... which are customary, or are at least *widely encouraged or approved*”, “resources ... commanded by the *average individuals*’ or *ordinary living patterns*” (Townsend 1979, 31, 88, 413 emphases added). These terms do less justice to intra-societal difference than Townsend’s own analysis of social sub-systems would counsel. Thus, for all his acknowledgement of different standards of necessity amongst different social sub-systems and minority groups, Townsend craves relatively unitary national standards of necessity for the empirical study of poverty. Sen takes social sub-systems more seriously.

Let us return to the linen shirt with which Smith makes a spatial and temporal comparison of the resource requirement for avoiding shame. Smith has a relatively coarse notion of the social unit which is the subject of such comparison; he compares large cultural groups or “nations” – Greece, Rome, England and France – but does not mention variability between communities within them, something for which Sen (1981, 18) criticizes him. Smith (1981/1776, V.ii.k.3) orientates his analysis to items which even the “lowest orders” (and therefore everybody) in society should be ashamed not to have. And although he adverts to different standards for Scottish men and women with regard to the wearing of leather shoes in public, when considering the same commodity for the English, he holds that leather shoes to be a necessary of “life in England” for the “poorest creditable person of either sex.” The macroscopic reference group “life in England” indicates that Smith’s attention is directed to the lowest common standards for all rather than the different standards of necessity amongst different orders of people. Sen (1983, 339) adverts to the importance of making finer differentiations – “*intra-country* or *intra-community*” differentiations, as he terms them. Sen thus makes space for the possibility that, in one society at a given time, resource requirements for being able to avoid shame and to participate in the life of the community differ from one community to another.

Before we continue, a word on terminology. In what follows, I use the term “society” and “nation” synonymously. I use the term “community,” by contrast, to refer to an *intra-societal* group. As soon as we acknowledge the intra-societal differences in standards of poverty, implications for classifying people as poor arise, as I illustrate in the following section.

#### **IV. Poverty, Riches and Resource Requirements**

Human beings’ sense of shame stems, *inter alia*, from their identification of a communal standard which they must meet if they are to avoid feeling shame. Individuals wish to “conform to established usage, to avoid unfavourable notice or comment, to live up to the accepted canons of decency in the kind, amount, and grade of goods consumed” (Veblen 1934[1899], 87). These are the “demands of social convention” to which Sen (1983, 335) refers. Different communities have different norms of decency, and hence they differ in resource requirements regarding what constitutes a necessity. The identification of a reference group is thus essential in examining poverty (cf. Runciman 1966, chapter II).

Consider a person whom I will call Lucy. Prior to 2007, she was a city broker who earned staggering sums of money, which allowed her to participate in the activities of the “super-rich” friends and acquaintances whom she met in her social circle which consisted mainly of fellow finance workers. Lucy lost her job in the City of London in 2007 and lost, thereby, not only her income but also considerable wealth that she had invested in toxic funds. Since 2008, she has worked at an insurance company, which pays but modestly by comparison. Nevertheless, her salary still places her in the highest quintile of the population, though far away from the echelons of the top 0.1% of income earners to which she once belonged. As a result of her significantly reduced salary and loss of wealth, Lucy has adopted a new lifestyle. She tried, initially, to orientate her social and personal life to the super-rich community, which had become her natural milieu in the years preceding the Financial Crisis, but her



income was no longer sufficient to partake in the life of that community. Rather than take on further debt in order to maintain her previous lifestyle, Lucy decided to live within her means. She disappeared from the community in which she formerly participated, moved out of her penthouse suite and sold her sports car to pay off debt. She curtails her consumption of alcohol and designer drugs, she holidays in less exotic locations and no longer frequents five-star restaurants three-to-five times per week. The community with which Lucy identifies, though, is still that of *nouveaux riches* financiers. Lucy, however, does not command sufficient financial resources to participate in the activities of this community; she is ashamed to try to participate or even to show her face in that community because of her “paltry” resources.

Consider two mutually exclusive depictions of Lucy’s post-Crisis situation:

- 1) Although Lucy remains well off by national standards as a result of the salary she earns in the insurance industry, her income is insufficient to allow her to participate in the life of her community. Lucy is poor because she cannot realize the community-participation and no-shame capabilities.
- 2) Lucy continues to dispose over more (financial) resources than most people in her society. Although she no longer feels able to participate in the activities of her preferred community, her previous ability to do so was based on her extravagant income. Although she no longer meets the no-shame capability of her (now former) community, she nevertheless earns an income which would allow most people (especially single and childless people, like Lucy) in her society to lead a comfortable life. Lucy is not poor.

Depiction 2) draws attention to Lucy’s favourable position concerning her relative income. Those who are drawn to this depiction will find it counter-intuitive to classify people who are relatively financially favoured as poor. Lucy is one of those people who “may feel poor, especially in reference to their previous situation in life, even when they are neither demonstrably poor nor acknowledged to be poor by society” (Townsend 1979, 49); but feeling poor is different from being poor, the proponents of depiction 2) would say. Sen’s work gives us reason to believe that Lucy does not merely *feel* poor. Although he does not discuss a case like Lucy’s, Sen’s approach demands that we classify Lucy as poor. A person, writes Sen (2009, 234), “need not necessarily be seen as being very advantaged, on the mere ground that her income is high.” Sen typically makes this point about high income in the context of those who are disadvantaged in realizing capabilities due to chronic illness or disability. The point, however, applies also to those who face obstacles in realizing the no-shame capability because the resource requirements of their community are particularly demanding.

In section 6, I explore whether Lucy can be classified as anything but poor from within the capability perspective. First, though, I discuss examples of cases similar to Lucy, which show that, historically, her case is not without precedent.

## V. The Affluent Poor in History

Let us return to Smith, who notes that “many a poor man” strives to be rich because he “places his glory in being thought rich” (1982/1790, I.iii.3.7). Therein lies the folly of the vain man, who tries to emulate the dress, equipage and way of living of those of higher rank than he (1982/1790, VI.iii.37). What escapes the poor man who sets himself this goal are the “duties” or “impositions” which are placed on those reputed to be rich. Smith does not expand on the notion of duties, but one may hypothesize that they consist of the necessary expense which the rich face in maintaining their lifestyle. Such expense “must soon reduce [the poor man] to beggary, and render his situation still more unlike that of those whom he admires and imitates, than it had been originally” (Smith, 1982/1790, I.iii.3.7, cf. IV.1.6, VI.iii.37). By referring to the duties which are imposed by riches, Smith’s remarks remind one of the situation faced by the feudal aristocracy in Europe whose expenditure could place them at the brink of bankruptcy (Hilton 1951, 28). Such expenditures sustained what we (and contemporaries at the time) would characterize as a luxurious lifestyle. But, as Norbert Elias (1969, 104-5) points out, the aristocracy’s putative luxury did not preclude the fact that expenditure on such “luxuries” was a necessary expense for an aristocrat, an “obligation of generosity” (*Verpflichtung zur Großzügigkeit*) imposed on the upper classes in court society. In order to play the public role expected of them and in order not to be publicly demeaned, aristocrats had to clothe, house and comport themselves in accordance with their rank. In discharging these sumptuary obligations, noble families could ruin themselves financially. Elias draws on Max Weber’s portrayal of aristocrats, according to which apparent sumptuary profligacy amongst aristocrats was an essential means of “social self-assertion” (Weber 1972, 651), “a necessity from which they cannot escape” (Elias 1969, 98). In terms of capabilities, we may associate Weber’s social self-assertion with Sen’s two social capabilities: without the material paraphernalia (resources) expected of an occupant of his rank, an aristocrat could not participate in the life of the court community. As Elias writes, “a duke must build his house in a way which expresses that he is a duke and not merely a count. The same applies for his whole appearance and demeanour” (Elias 1969, 99). To lack the resources which become a duke, and thus to fail to manifest oneself publicly as a duke, would be shameful.

Examples of this apparently paradoxical necessity of profligacy are not limited to feudal Europe. British North America provides a further case of apparent extravagance being a necessity for the fulfilment of social capabilities. Tobacco planters in Virginia became increasingly and heavily indebted to British merchants. On the supply side, their indebtedness resulted from the vicissitudes of growing the delicate and recalcitrant plant and from the fluctuating market price of their product. On the demand side, indebtedness was attributable to tobacco growers’ taste for the latest fashions which were imported from England. Andrew Burnaby, an Englishman who travelled in the colonies in 1759 and 1760, was struck by the “extravagance, ostentation, and a disregard of economy” as well as the ease with which “Virginians over-run their incomes” (quoted in Breen 1985, 105-106). The putative profligacy was not, however, that, but rather a necessity, for through the consumption of pricey and fashionable English imports, a tobacco planter could “hide the true nature of his finances even from his friends, the people with whom he dealt on the county court or in the House of Burgesses” (Breen 1985, 106). Going into debt was, paradoxically, the best means of hiding one’s indebtedness, and not being

dependent on creditors was a crucial part of avoiding shame in colonial Virginia. One's ability to fulfil public duties in courts and legislatures (and hence take part in the life of the community) would have been compromised had one not kept the state of one's finances hidden.

In 1769, George Washington, then an indebted Virginian tobacco farmer, gave voice to the difficulty facing a typical planter who tries to "live within bounds":

for how can I, *says he*, who have lived in such & such a manner change my method? I am ashamed to do it: and besides, such an alteration in the System of my living, will create suspicions of a decay in my fortune, & such a thought the world must not harbour; I will e'en continue my course: till at last the course discontinues the Estate, a sale of it being the consequence of his perseverance in error. This I am satisfied is the way that many who have set out in the wrong tract, have reasoned, till ruin stares them in the face (1769).

Tobacco planters were not only embroiled in the problem of furnishing themselves with the resources requirements to meet social capabilities; they also proposed a solution, in which Washington was involved. The letter quoted above, from Washington to George Mason, addresses the colonists' response to British attempts to raise revenue from the colonies in the form of the Stamp Act (1765) and the Revenue Acts, the first of which being enacted in 1767. Various colonies in British North America founded non-importation associations to orchestrate a collective boycott of certain British imports. Washington extolled the Virginia Association, founded in 1769, for both its "public advantages" (to protest against and perhaps change British tax policy) and its "private advantages" – diminishing planters' indebtedness. What was being proposed in the private sphere was a cooperative solution to a prisoners' dilemma, whereby each planter would reduce his consumption of British-made goods. The planter would not thereby compromise his ability to realize the no-shame capability, for if one planter's sumptuary restraint was matched by others', the resource requirement for meeting the no-shame capability would fall. Planters could thus reduce their debts and deflate the spiral of conspicuous consumption of goods which had become necessities for avoiding shame.

A number of factors conspired to doom the Association's non-importation plan to failure. Although Washington was able to clear his debt in 1773, he did so only thanks to an inheritance. By this time, the Association's boycott of British imports had all but floundered (Ragsdale 1989, 159-160). The main failure lay in the lack of resolve to curtail which Washington attributes to the actions of "selfish designing men (ever attentive to their own gain, & watchful of every turn that can assist their lucrative views, in preference to any other consideration)" (1769). As economists have long been aware, maintaining the cooperative strategy in a prisoners' dilemma requires resolve, or, as Sen (1977) calls it, "commitment", and Virginian tobacco growers lacked sufficient commitment to the plan. The failure of the non-importation plan confirms a principle to which Veblen refers:

Many items of customary expenditure prove on analysis to be almost purely wasteful, and they are therefore honorific only, but after they have once been incorporated into the scale of decent consumption, and so have become an integral part of one's scheme of life, it is quite as hard to

give up these as it is to give up many items that conduce directly to one's physical comfort, or even that may be necessary to life and health (1934/[1899], 77-8).

This excursus on medieval and early-modern history raises the question whether feudal lords or tobacco growers may be deemed poor. Their ability to meet the no-shame capability and to participate in the life of the community impose financially ruinous resource requirements on them, even though, compared to many in their societies, they are affluent, even extravagantly so. Although our fallen City-of-London broker, Lucy, inhabits a society of equals rather than a society of orders, like feudal Europe, or a society based on the status hierarchies of British North America, when it comes to the realization of social capabilities, the problem faced by the affluent poor in each society is the same. And this returns us to the classification of Lucy: is she really to be deemed poor? In the following section, I discuss five arguments each of which, if valid, would exclude her from the ranks of the poor.

## VI. Whose Standards, Which Community?

### 6.1. Conversion Rates

At first blush, Lucy's case involves a conversion problem, the type of which Sen frequently mentions. A person's ownership of or access to resources does not tell us much about that person's well-being until we know how well she can convert resources into *functionings*. People can convert resources into functionings at varying rates. For instance, the relationship between the consumption of food and the functioning of being well nourished will vary according to one's age, sex, metabolic rate, general health, activity level and whether one is pregnant or lactating (Sen 1985a, 198-9).<sup>1</sup> The same applies to the capability of avoiding shame: a given quantity of resources such as income will give some people the ability to acquire certain commodities and styles of life such that they will neither feel shame in public nor be excluded from the life of their community. For others, who inhabit communities with more exacting standards, the same quantity of resources will be insufficient to avoid shame, and they will be excluded from participation in communal life.

By adverting to the conversion of resources into well-being, the capability approach departs from approaches which examine poverty in the space of resources. Whichever capability we consider, we must ascertain each individual's ability to convert resources into well-being. If, for example, a pregnant woman who worked long hours at a hard, agricultural job in a hot climate were to complain that her food ration was insufficient to nourish her properly, it would be unjust if we responded by telling her that the same ration would suffice to nourish a young, healthy man who worked shorter hours in an air-conditioned office. In making judgements about their well-being, we would not, that is, use standards appropriate to the resources commanded by the man to judge the situation of the woman. Does consistency demand that we do the same in the case of Lucy? That is, would it be unjust to judge Lucy's situation by standards other than those appropriate to the rate at which she herself can convert resources into the no-shame and community-participation capabilities? Sen apparently thinks this would be unjust. Concerning a person's feelings of deprivation, he writes: "one has to look at the

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1 For an empirical investigation of conversion rates between income and capabilities, see Hick (2016).

groups with which the people in question actually compare themselves” (1981, 16). So, if Lucy compares herself with the standards of her former, super-rich, community, these are the relevant ones in assessing whether or not she be deprived.

Sen’s remarks on commodity requirements for social functionings in rich countries fortify the point. He writes:

In a country that is generally rich, more income may be needed to buy enough commodities to achieve the *same social functioning*, such as ‘appearing in public without shame.’ The same applies to the capability of ‘taking part in the life of the community.’ These general social functionings impose commodity requirements that vary with what *others* in the community standardly have.

And he continues:

While the rural Indian may have little problem in appearing in public without shame with relatively modest clothing and can take part in the life of the community without a telephone or a television, the commodity requirements of these general functionings are much more demanding in a country where people standardly use a bigger basket of diverse commodities (Sen 1992, 115-116).

Again, we would be remiss were we to judge the requirements for taking part in the life of a rich society by the standards for taking part in the life of a poorer one. One would not, that is, comfort a Norwegian who had neither phone nor car nor thermal winter coat by telling him that many people in Cambodia get along perfectly well without such items. Sen sees no difficulty in applying different standards of resource requirement for meeting the no-shame and community-participation capabilities across different countries. But if he is to draw such contrasts between countries, consistency demands that comparisons between communities within a country also be permissible. Just as appearing in public without shame and taking part in the life of the community require more resources in a rich country than in a poor one, so a rich community in one country will require more resources for meeting these capabilities than a poorer community in the same country. Lucy happens to orientate herself to the requirements of a very rich community in a rich country, and this imposes high resource demands on her if she is to realize the no-shame and community-participation capabilities. Just as Sen judges resource requirements in a rich country according to standards internal to that country, so we should judge Lucy’s requirements for meeting these two capabilities according to standards internal to her community. This speaks in favour of classifying her according to depiction 1), above: Lucy is poor.

## 6.2. *Minimum Standards*

Consider a suggestion from Sen which involves setting a standard of minimum capabilities in a society. “Anyone failing to reach that absolute [minimum] level would be classified as poor” (1985b, 670). The minimum-standards approach has a long history in poverty studies, and it is hard to see how studies of

poverty could dispense with the idea *in toto*. Smith, as we saw, has minimum standards in mind when he considers what is necessary for the “lowest orders” in society (1981/1776, V.ii.k.3). Seebohm Rowntree’s *Study of Town Life* adopts a minimum-standards approach of a physical subsistence sort when he defines “primary poverty” to affect those whose earnings did not suffice “to obtain the minimum necessities for the maintenance of merely physical efficiency” (Rowntree n.d./1901, 117). The subsistence notion of a minimum has fallen into desuetude with the advent of relative approaches to poverty like Townsend’s (and indeed, Smith’s example of linen shirts shows that he had already superseded such an approach in the eighteenth century). But Townsend does adhere to a revised minimum-standards approach. What he objects to is a minimum-standards approach which conceives those standards (i) in terms of the concept of subsistence, and (ii) as absolute (unchanging) (Townsend 1979, 38, 59). Townsend’s modified minimum-standards approach manifests itself in his construction of deprivation index of twelve necessities, the lack of one or more of which excludes a person from “ordinary living patterns, customs and activities” (1979, 31, 250). If one lacks one of these necessities, one is deprived.

A criterion that Townsend rejects for assessing whether an item belongs on the deprivation index is that it be “socially perceived” or “conventionally acknowledged” to be a necessity. For Townsend, conventional acknowledgement is insufficient for inclusion in his index because the criterion is not “objective” (Townsend 1979, 46). Furthermore, the public’s perception of poverty, though “more generous” than starvation poverty, fails sufficiently to acknowledge the idea of necessities which go beyond subsistence. The public, therefore, does not hold poverty to be as thoroughlygoingly relative as Townsend holds it to be, for it draws the scope of necessities too narrowly (Townsend 1979, 914-5).

In contrast to Townsend, Mack and Lansley (1985; 2015) embrace social perception as the criterion for including an item in an index of necessities. Indeed, Mack and Lansley define poverty “*in terms of an enforced lack of socially perceived necessities*” (1985, 39). Judging what is a necessity, they argue, should not be left to “expert” judgement; instead, their approach identifies a minimum acceptable style of life “by reference to *the views of society as a whole*” (1985, 42). Mack and Lansley find a surprising degree of homogeneity in social perceptions of the necessities which belong to a minimally adequate style of life (1985, 59-69; 2015, 25-31). In light of this, we must ask whether an analysis of poverty which descends to the level of communities within societies is necessary. The near consensus on identifying necessities – at least in Britain in 1983 and again in 2012, the dates of the surveys on which Mack and Lansley base their studies – surely obviates the need to conduct intra-societal analysis of the sort Sen recommends and on which Townsend, too, embarks.

Before we conclude thus, note that the items which the public perceives as necessities in Mack and Lansley’s index, refer to *types* of activity. Townsend (1979, 59) anticipates Mack and Lansley’s approach and provides a criticism thereof. He distinguishes types of activity deemed necessary by a majority of the national populace from the “specific content” of such activities. That is, one must consider different concrete understandings of a type of activity by different communities in society. Townsend illustrates with the example of celebrating Christmas:

Christmas may be celebrated by an exchange of gifts from Woolworth's, a few glasses of beer and a chicken from a broiler factory; or by an exchange of gifts in the best tradition of Harrods or Heal's, together with all the luxurious trappings of a country-house week-end party (1979, 249).

Similar things may be said of many items on Mack and Lansley's list of necessities, e.g. children's toys, celebrations on special occasions, annual holidays, clothing, presents, a garden, etc. (1985, 54; 2015, 20). What, in one community, is a perfectly adequate birthday present, holiday, item of clothing, might, in another, be held inadequate, perhaps shamefully so. Consensus on types of item perceived to be necessary does not tell us much unless we conduct the finer-grained analysis of the intra-societal content of these types of item or activity. This is precisely the analysis held to be essential by Sen.

Furthermore, Mack and Lansley's study does not conceive necessities in terms of capabilities. Using capabilities would weaken the consensus that Mack and Lansley find in the social perception of necessities. Few people, for example, would dissent from the view that people who lack basic capabilities are in some way deprived, and hence these capabilities are necessary for a decent life. But when we turn to the specific content of these capabilities, we find that resource requirements for meeting them differ. This applies to many of the items Mack and Lansley find to be perceived as necessities: the abstractness of categories like "holidays," "celebrations," "toys," etc., which most people perceive as necessities, masks the intra-societal relativity of such terms when we consider their specifics, i.e. which toys, what sort of celebration, etc. Just as Townsend's Christmas celebration can involve large differences in resources, so a holiday is different in expense and extravagance for those in the super-rich community with which Lucy identifies to a holiday for a working-class family from a mining community in Wales. The post-Crisis Lucy can afford all the items on Mack and Lansley's list of necessities, and hence, she is not deprived according to that list. But she can only afford the items on the list in ways which do not meet the standards of the super-rich community. Lucy could afford a two-week camping holiday, but in the community to which she orientates herself, a holiday entails destinations such as Monaco, Dubai or the Virgin Islands, and tents are not part of such holidays. We have already argued, in section 5.1, that there is no justification in judging Lucy according to the less demanding standards of a community which is not her own. Hence, the types of activity upon which Mack and Lansley base their index of poverty do not allow us to classify Lucy as anything but poor once we consider the concrete manifestation of these types for the community to which Lucy orientates her lifestyle. Minimum standards, because of their concrete variation between communities, cannot circumvent that judgement.

### *6.3. Clustering*

Consider the phenomenon of "clustering" (Mack and Lansley 1985, 102; Wolff and De-Shalit 2007, chapter 7), whereby individuals who lack one type of necessity often lack others. Deprivations, in other words, are gregarious creatures. Clustering offers a path along which those who wish to contest Lucy's poverty may travel. On account of her relative affluence, Lucy differs from the "genuinely" poor, the argument would go, because her capability deficit is localized, not clustered; she is deprived only of

Sen's two social capabilities but not of others. Lucy's current income is still appreciable when compared to the less affluent poor, and it is sufficient to allow her to meet most capabilities which are out of the reach of those who really deserve to be classified as poor.

This is a less promising line of thought than first appears for those who wish to dispute Lucy's claim to be poor, and this for two reasons. First, although Lucy is immediately deprived only of Sen's social capabilities, these are serious deprivations in themselves. Sen classifies both social capabilities as *basic*. They are therefore brethren of the following capabilities which Sen, at one time or other, has also deemed basic: the ability to meet nutritional requirements, to be mobile, to avoid premature death, to be well sheltered and clothed, to develop skills for professional purposes, to be educated (1980, 218; 1983, 337; 1985a, 217; 1992, 44-45; 2009, 233). Of his social capabilities, Sen writes: "not being able to relate to others and to take part in the life of the community can directly impoverish a person's life. It is a loss on its own, in addition to whatever further deprivation it may indirectly generate" (2000, 13). Some studies of poverty place great emphasis on these social capabilities. Wolff and De-Shalit (2007, 122), for example, find that "affiliation," as Martha Nussbaum (2001, 87) describes it, or "belonging," as Wolff and De-Shalit (2007, 106) prefer, is one of six "high-weight" functionings. Both of Sen's social capabilities fall under the heading of "belonging" and might therefore be accorded special importance compared to others.

The second reason clustering fails to differentiate Lucy from other people whom one might deem as "genuinely" poor concerns the "fertility" of the functionings associated with Sen's two social capabilities. Living a life without shame and being able to contribute to the life of the community are "fertile" functionings in the sense that achieving them "will lead to improvements in other functionings" (Wolff and De-Shalit, 2007, 133-4, 139-42). Conversely, a loss of the capability to belong to communities towards which one has an affinity is not only a loss in itself, but is one which ramifies in a person's life. That is, being deprived of Sen's two social capabilities can generate further capability deprivation, and hence it would be unsurprising if Lucy experienced a clustering of deprivations. Her ability to be happy and her ability to cultivate feelings of self-esteem will be compromised by her inability to avoid shame and to participate in the life of the community. She might share the self-despising attitude common amongst poor people (Walker *et al.*, 2013, 224, 230). This can have repercussions for her ability to form and maintain friendships, for she might withdraw into herself and lead a reclusive life. Her physical and mental health might suffer as a result. If, for instance, she suffers depression, those capabilities currently within her grasp, e.g. her ability to maintain her job and earn an income, will become less secure. The relative security one has to maintain one's current capabilities is an important facet of one's capability set (Wolff and De-Shalit, 2007, 68-72). Lucy will not be immune to clustering, and, in this respect, she differs from Wolff and De-Shalit's imaginary "high-flying city trader who does well in every respect except the functioning of play" (2007, 101), first because play, in Wolff and De-Shalit's study, is not a high-weight functioning, and second because being deprived of the capability play, unlike being deprived of Sen's two social capabilities, is less likely to cause a clustering of deprivations.



Consequently, Lucy's immediate lack of only two (social) capabilities does not give us reason to contest her deprivation. Deprivations cannot be judged quantitatively, that is, according to the number of capabilities one lacks; rather, the student of poverty must take into account qualitative differences in a person's being denied certain capabilities. Lacking two high-weight and fertile capabilities, as Sen's two social capabilities are, constitutes a serious deprivation.

#### *6.4. Ignoble Motives*

Some might object to the classification of Lucy as poor on the suspicion that her motives be less than noble, and that it is morally dubious to cater to such motives. What lies behind this objection is, first, a distaste toward the magnitude of resources, which must be put at Lucy's disposal if she is to realize the no-shame and community-participation capabilities. But beyond this, there is the inescapable fact that not everybody can be provided (or provide themselves) with like resources, and the mere fact that Lucy wishes not only to realize these two capabilities, but realize them in the concrete form required for membership of a super-rich community makes the exclusionary or elitist nature of her wish hard to overlook. What goes along with the possession of resources required to participate in a super-rich community are (i) an inability of others to do the same and (ii) a status or class privilege enjoyed by the super-rich over others (cf. Berry, 1994, 224). People like Lucy are all too often motivated by snobbery or, as Veblen writes, by a desire to come out well from an "invidious comparison which prompts us to outdo those with whom we are in the habit of classing ourselves" (1934/[1899], 87). Lucy, according to this objection to classing her as poor, wishes to stand out from others, be "better" than them, and this is not a wish which we should legitimize by bestowing the status of poverty on her.

The foregoing objection is sound if one judges people according to the resources which they require to meet Sen's social capabilities. Lucy, that is, requires an absurdly demanding level of resources to realize these capabilities, and if she were to possess or be provided with the requisite resources, she would stand out from others to a degree which might engender envy and animosity amongst others. But the desire to stand out is not integral to our depiction of Lucy, especially when we transfer the focus from resources to capabilities. Viewed through the lens of capabilities, Lucy is in no way trying to stand out or achieve a class or status privilege which is denied to others. On the contrary, she merely wishes for what others in her society wish, namely, not to be ostracised by those whose recognition and friendship she values. There is nothing invidious about the way she wishes to compare herself to others. She does not, that is, compare herself to others outside the community to which she wants to belong "with a view to rating and grading them in respect of relative worth or value" (Veblen 1934/[1899], 27). Indeed, it is precisely because she thinks of people as equals that she believes that she, like everyone else, has a right to meet Sen's social capabilities in the community of which she strives to be a part. Ignoble motives are therefore no part of Lucy's predicament, and so we may not withhold the classification of being poor from a concern that classifying her as poor would be to impress a stamp of legitimacy on ignoble motives.

### 6.5. Expensive Tastes

The last attempt I consider to contest the claim that Lucy is poor involves an appeal to expensive tastes. Expensive tastes inhibit the ability of those who have them to derive welfare from given resources. They give rise to two questions:

- 1) *The Classificatory Question*: do expensive tastes have implications for classifying people as deprived?
- 2) *The Compensatory Question*: do expensive tastes justify claims, by those who have them, to compensation?

Regarding question 2), Ronald Dworkin (1981, 228) finds it “counter-intuitive” to compensate someone who has “champagne tastes” with more resources so that she can attain the same level of welfare as others. This thought applies to the post-Crisis Lucy who, though still endowed with above-average income, has tastes (for avoiding shame and participating in the life of a particular community) which are expensive. Sen addresses the issue when he contrasts someone with expensive tastes to a disabled person:

the expensive-taste person may be able to *do* most things a normal person can and be handicapped only in the context of achieving contentment or satisfaction, whereas the disabled person may be handicapped in terms of a much wider range of activities (1985a, 196-7).

With this comparison, Sen is referring to the phenomenon of clustering which was addressed in the previous subsection but one: the expensive-taste person’s capability deficits might not be clustered whereas the disabled person’s deficits are. The disabled person’s deprivation, according to the severity of her disabilities, is thus more forbidding than that of the person who has expensive tastes. But this line of argument does not address Lucy’s capability deficits; for, as I argued in subsection 5.3, Lucy’s deprivation is not localized because her inability to realize the no-shame and community-participation capabilities ramifies to other capability deficits. Her situation is therefore unlike that of the expensive-taste person depicted by Sen who has but one deficit, namely, a reduced ability to achieve contentment. Hence, Sen’s intervention here does not allow us to challenge the classification of Lucy as deprived.

Many commentators attach import to whether a person chooses to develop expensive tastes, whereby those who do thus choose have no rightful claim to compensation on account of the expense needed to satisfy these tastes. This raises the question of *responsibility* for one’s tastes (Cohen 1989). One’s degree of responsibility might be decisive to the question of compensation, but it is not a factor in *classifying* people as deprived (Sen, 1985a: 197, n. 27), for whether one is correctly classified as deprived is independent of the aetiology of one’s tastes. And since the capability perspective enquires into the capability of agents to do and be certain things, it is unclear whether tastes play any role in classifying people as poor. This is perhaps just as well for the capability approach, for the notion of choosing to develop one’s tastes, and hence being responsible for having them, is anything but clear cut. As G.A. Cohen notes, the implications of expensive tastes rest on answers to “metaphysical

questions that may be impossible to answer” (1989, 934). The metaphysical questions to which Cohen refers concern free will and determinism, that is, questions which enquire whether a person’s choice (in this case, to have certain tastes) are truly free and whether she may be held responsible for the consequences of making those choices. Awaiting a philosophical answer to this question before one provides the definitive view on expensive tastes will entail a long wait.

Hence, the capability approach, to the extent that it addresses the classificatory question only, does not become embroiled in the distributive implications of expensive tastes to which egalitarians have directed their attention (Kaufman 2006, 9). However, as soon as the compensatory question is posed, even if it is posed in the space of capabilities rather than resources or welfare, capability theorists will find themselves tackling the issue on the terrain on which other egalitarians have tackled it, and this means addressing issues such as choice and responsibility for one’s tastes. For as Simon Keller (2002, 539) notes, just as an agent can influence her tastes and hence the rate at which she can convert given resources into contentment, so an agent can influence her ability to convert resources into capabilities. Consequently, the compensatory question remains to be answered. In the space of capabilities, consider my choice whether to exercise frequently and to nourish myself healthily. How I choose will exercise a future influence on the use to which I can put my legs in realizing the capability of being mobile; years of a gluttonous diet with little exercise will lead to obesity and divest me of the ability to get about using my legs compared to the ability of others. Whether I have a claim to a mobility device at the cost of others, given my choice to lead an unhealthy life, is a question the capability approach must confront.

Ingrid Robeyns (2006, 373) calls the issue of expensive tastes an “unsolved” problem for the capability approach. She holds that the approach “can handle the expensive tastes problem only when the expensive taste cannot be justified by environment-dependent functionings.” By “*handle* the expensive tastes problem,” she seems to mean that the capability approach can ignore expensive tastes (and the claims which follow therefrom) only when the tastes in question have arisen independently of the demands of one’s environment. But if the environment imposes certain standards upon a person (as it does in Robeyns’ example of business consultants who “require more expensive clothes than academics or social workers”), capability theorists, like other egalitarians, must grapple with the implications of such tastes. To what extent has a business consultant chosen to pursue that career, and is the degree of chosenness greater or less than that of Robeyns’ “upper class man [who] might “need” an expensive car in order to earn respect from his peers”?

I do not pursue the question here but stress only that, by restricting itself to the classificatory question, the capability approach can bracket such matters. It is the classificatory question concerning Lucy’s situation to which I have been limiting myself in this essay. If we take Sen’s remarks seriously, then the causal history of Lucy’s tastes, however extravagant they seem, is not relevant to classifying her as deprived or otherwise. There is nothing about the issue of expensive tastes which leads us to conclude that she is not deprived. Lucy, if we are loyal to the capability approach, remains poor.

## VII. Conclusion

However paradoxical it might seem, the category of the affluent poor is a necessary one in the capability perspective. It is therefore one which capability theorists should embrace. As soon as one develops a differentiated notion of community, as Sen does, one must acknowledge that being able to avoid shame and being able to participate in the life of one's community, both of which are essential to avoiding deprivation, are both capabilities which, though absolute achievements for an individual who realizes them, require resources which differ markedly from community to community. Without the requisite resources, an individual, whether from a community with highly or less demanding standards, must be deemed poor.

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