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Amartya Kumar Sen's ethical interpretation of poverty *

Abstract

On the threshold of the 21st century, the problem of poverty remains unresolved. Many still suffer from hunger, and many more have no access to running water, or education. This raises a fundamental question that has bothered economy researchers for centuries: What determines the wealth of some countries, and the poverty of others? One of the contemporary researchers analysing the causes of poverty and development barriers is Indian economist Amartya Kumar Sen. Referring to the socio-economic theory of Sen, the author indicates that modernity implies the need for reflection on the definition of poverty. The author attempts to justify the thesis which focuses on the discord between the evaluation concepts of good and evil with objective economic factors defining poverty. The author suggests that the definition of poverty should be grounded in considerations concerning good and evil in a specific time, as well as cultural and historical context.

Keywords: poverty, development, Amartya Sen

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1. Introductory remarks

What is development? What factors determine whether a country is wealthy or poor? While many researchers have been trying to answer these questions for years, Adam Smith's thoughts in *An Inquiry into the Nature and Causes of the Wealth of Nations* (1776) constitute a "cornerstone" for such considerations.¹

In the era of globalization, despite an intensive development in numerous areas of human life, the problem of extreme poverty has not been eliminated.² The UN 2015 report on the Millennium Development Goals reveals that although various aspects of poor people's lives have improved, not all of the objectives established in 2000 were fully met.³ The waves of hunger still sweep through the world, and many people still do not have access to drinking water, basic healthcare or education. It shows that there are still problems regarding mass poverty and sustainable development that should be addressed and that pose a challenge to the current generation.

Several contemporary economists involved in investigating the causes of poverty were awarded the Nobel Memorial Prize in Economic Sciences, including Gunnar Myrdal, Robert Solow, Douglass C. North, Joseph Eugene Stiglitz and Angus Deaton. Another representative of this group is Amartya Kumar Sen, the 1998 Nobel Prize laureate in the field of economic sciences. The leitmotif of his works are the phenomena of poverty and of barriers to development in a broad sense.⁴ What is characteristic of his approach is the fact that in a description of poverty, he strongly criticizes measuring inequalities in terms of income and creates an alternative to this approach by introducing the concepts of *capability* and *functionings*.⁵ Sen identifies development with extending the scope of human freedom, asserting that political rights and liberties favour the process.

¹ On the discussion about the reasons of economic growth, see Dzionek-Kozłowska & Matera (2016).

² In this article, the term *poverty* will be used interchangeably with *impoverishment*.

³ The Millennium Development Goals set out to: (1) halve the number of people living on less than \$1 a day; (2) provide opportunities to complete primary education; (3) promote gender equality and social advancement of women; (4) reduce the under-five mortality rate; (5) improve maternal health and reduce maternal mortality; (6) control the spread of HIV/AIDS, malaria and other infectious diseases; (7) promote the principles of sustainable development in order to improve the state of the environment; (8) develop a global partnership for development and combating poverty (United Nations, 2015). For more on achieving Millennium Development Goals, cf. Czaja (2016).

⁴ Amartya Kumar Sen is a professor of philosophy and economics at Harvard University. In addition to winning the he Swedish National Bank's Prize in Economic Sciences in Memory of Alfred Nobel, he received several other prestigious awards, including the Bharat Ratna award and the Eisenhower Medal. He studied mathematics and economics at Visva-Bharati University in India, he completed his doctoral thesis at Trinity College in Cambridge (1959). He undertook the studies in philosophy at Jadavpur University in India. In his academic work, Sen was associated with many renowned universities, such as the Delhi School of Economics, Cambridge, Stanford and the London School of Economics. Together with Mahbub ul Haq, he was commissioned by the UN to devise the Human Development Index (HDI). He is the author of 30 books and over 360 articles. His more important works include: *Collective Choice and Social Welfare*; *Poverty and Famines*; *On Economic Inequality*; *Development as Freedom*; *Identity and Violence* and *Missmeasuring Our Lives. Why GDP Doesn't Add Up* (together with Joseph Stiglitz and Jean-Paul Fitoussi). Cf. Kohler, 2007, pp. 171–185.

⁵ The terms *capability* and *functionings* are explained in the subsection 3.

The aim of the article is to attempt to juxtapose the existing definitions of poverty and the approaches to the analysis of this phenomenon with Sen's idea. Referring to his concept, the author seeks to demonstrate that the definition of poverty should be considered within the framework of ethics.

The adopted research method involves the study of the source literature. The first part of the article provides the definitions of poverty and characterizes the ways of presenting the phenomenon, whereas the second part analyses and interprets Sen's views basing on his most important works. In the conclusions, the author puts forward arguments supporting the thesis that Sen's concept of human capabilities indicates the necessity for approaching the definition of poverty on an ethical level.

2. What is poverty?

Similarly, to other categories used to describe social reality, the concept of poverty is not understood and defined in a unified way. Majid Rajnehma (2007, p. 35) writes:

there may be as many poor and as many perceptions of poverty as there are human beings. The fantastic variety of cases entitling a person to be called poor in different cultures and languages is such that, all in all, everything and everyone under the sun could be labelled as poor, in one way or another.

Since the earliest times, many cultures saw poverty as the state opposite to wealth (Rajnehma, 2007, p. 36). Hence, one of the most common definitions of poverty refers to income. A person is considered poor if their income is not sufficient to satisfactorily fulfil their needs and does not allow them to reach the standard of living which is regarded as a minimum in a given society. According to the approach adopted by the World Bank and the International Monetary Fund (2015, p. 32), with income *per capita* measured in purchasing power parity as a criterion, three poverty levels can be distinguished: extreme poverty, moderate poverty, and at risk of poverty. These categories, together with the corresponding income thresholds, are presented in Table 1.

Table 1. Poverty levels according to the World Bank

The level of poverty	Income <i>per capita</i> measured in purchasing power parity
extremely poor	less than \$1.25 a day in low-income countries less than \$2 a day in middle-income countries
moderately poor	\$1.25–4 a day
at risk of poverty	\$4–10 a day

Note. Adapted from "World Development Report 2014/2015. Ending poverty and sharing prosperity," by the Washington World Bank and International Monetary Fund, 2015, p. 32.

Establishing the income threshold that makes it possible to assess whether a country is poor and underdeveloped resulted in the adoption of Gross Domestic Product as a basic measure of wealth (Rajnehma, 2007, p. 40).

The literature on the subject offers a division of poverty into three categories: absolute, relative and moderate. The absolute poverty is most common in developing countries. The affected societies are often struggling with the inability to satisfy their basic human needs, such as healthcare, clothing, housing, food and access to drinking water (Sachs, 2005, p. 20). The notion of absolute poverty is similar to the biological definition of poverty. As stated by one of those who coined it—Seebohm Rowntree, poverty should be recognized when the basic physiological needs of a human being, such as food or clothing, are unmet. A shortage of these goods frequently leads to a life-threatening situation resulting from the exhaustion of the body (Sen, 1981, pp. 11–12; cf. Kwarciański, 2006b, pp. 31–32).

Unlike the lives of the people affected by absolute poverty, the lives of those in moderate poverty are not at risk. Yet, the range of satisfied needs is kept to the minimum that is required for further existence (Sachs, 2005, p. 20).

In relative terms, a person is believed to be poor if his or her living standard is lower than the one which is considered desirable in a given society (Panek, 2008, p. 41). People affected by this type of poverty have limited access to goods and services that mark a higher social status, e.g. recreation or better healthcare (Sachs, 2005, p. 20). Therefore, relative poverty cannot be entirely eliminated (Panek, 2008, p. 41). The necessity to possess certain goods to determine our social status brings about the situation in which people from rich countries are in possession of such goods as a TV set or a car and yet, they are still considered poor regardless of their possessions because these goods are seen as a standard in that society.⁶

The element linking all the definitions of poverty is a shortage or lack of some component. The most frequently mentioned are: high income, health care, food, etc. (Rajnehma, 2007, p. 37). John Kenneth Galbraith stresses that there is no explanation for the causes of poverty that would be fully satisfactory. In addition, he emphasises that many theories capturing the essence of poverty are based on considerable simplifications, whose aim is to prove their practical usefulness (1987, p. 10).

- (1) Rajnehma (2007) distinguishes four dimensions in which poverty should be analysed:
- (2) the first dimension refers to absolute factors, which encompass existential categories such as: lack of respect in the society, humiliation, sense of being rejected, inability to achieve life goals. Various forms of oppression and lack of civil rights also belong to this group. In addition, absolute factors include all other forms of poverty, such as hunger and homelessness;
- (3) the second dimension concerns the perception of poverty by people affected by it. The term poverty takes on a particular meaning only when

⁶ For example, having a ten-year-old car in Poland is an attribute of the middle-class, whereas in Germany it is associated with the lower layers of society.

- a factor or group of factors make a person see himself or herself as poor. It is always unique to each individual and stems from the sociocultural context. Not every person lacking specific goods should be considered poor. To some people raised in a culture that values simplicity and modesty—like, for example, the followers of Mahatma Gandhi—the life free from material goods⁷ is a blessing that gives you an opportunity to achieve the spiritual richness, in line with Muhammad's saying *Al faqro faxri (Poverty is my pride and glory)* (Rajnehma, 2007, p. 38). According to Gandhi, fulfilling solely basic needs in life leads to the development of self-governance, which in combination with the simplicity of action can heal the civilization and allow people to gain the political and economic autonomy. It is worth noting that Gandhi promoted the idea of voluntary poverty in the form of modesty, which permits to reach high moral standards. For this reason, Gandhi associated material possessions with both economic and ethical issues (Matera, 2013). Accordingly, in the opinion of the British sociologist Georg Simmel, a person becomes poor in a social sense the moment he or she receives help (Grabowska, 2012, p. 39);
- (4) the third dimension deals with the issue of how the impoverished are viewed by others. Poverty is most often perceived as a negative phenomenon, which should be combated due to established social, cultural and ethical behaviours. On the other hand, some believe that poverty is an inherent and inevitable part of human life, and all attempts to remedy the situation have negative consequences (Rajnehma, 2007, p. 39). The extreme form of this standpoint is expressed in the metaphor of a "lifeboat" put forward by Garrett Hardin (1974, pp. 38–43). A boat is carrying 50 people. Next, we can see around 100 people begging for help. Since the boat can accommodate only 60 people, taking those in need aboard would cause disaster and make everyone drown. As G. Hardin writes: "complete justice, complete catastrophe" (Hardin, 1974, p. 38, after Kwarciński, 2006a, p. 235). Michael J. Sandel (2013, p. 36) points out that in such a situation, we face a conflict of values (can one life be sacrificed to save another?) and uncertainty as to the actual outcome of a given decision (will the boat actually sink if the people asking for help are taken aboard?). In his view, the distribution of goods (in this particular case, space on the boat) can be considered taking into account three values: welfare, freedom and virtue. He emphasizes that the choice of a particular ideal implies a way of thinking about justice (2013, pp. 29–30);
- (5) the fourth dimension involves the social-cultural space-times, i.e. all the factors mentioned above in relation to each other. Over time, they are subject to modifications stemming from the changes that occur in the space-time to which they belong. Thus, many factors are perceived differently by the poor and the rest of society, and poverty becomes a relative term (Rajnehma, 2007, p. 39). By way of example, in the 1970s and

⁷ In the literature on the subject, the standpoint promoting an ascetic lifestyle is often referred to as the Gandhi effect. Cf. Dzionek-Kozłowska & Matera, 2015, p. 59.

1980s, having a car was an indicator of high social status in Poland, whereas nowadays hardly any household manages without it.⁸ Another instance is having Internet access or a mobile phone.⁹

3. Poverty according to Sen

Sen defines poverty as “lacking the minimum of elementary capabilities” (2000, p. 23) or “capability deprivation” (2010, p. 254). In this way, poverty can also be interpreted in normative terms and considered on a moral level. The scholar underlines that owing to the overlapping of ethical and economic concepts, it is difficult to unequivocally assess who a poor person is and so, in the description of inequality, one should seek an answer to the question: what are the poor people deprived of? (Zwarthoed, 2012, p. 39). In his book *Development as Freedom*, Sen tells the Annapurna parable, illustrating the ambiguity in the notion of poverty. The protagonist, Annapurna, is a young woman who wants to hire someone to tend her garden. Since the task is quite simple, she decides to pay the same amount of money regardless of who will do the work. She has three unemployed people to choose from Dinu, Bishano and Rogini. The first one has the lowest income; yet, he has already grown accustomed to living in poverty. Bishano has a higher income than Dinu, but he is the unhappiest of the three since he has just lost all his fortune and is not used to being poor. Rogini—the only woman applying for the gardener’s position—is accustomed to living in poverty, just like Dinu. But even though she is neither the poorest nor the least happy of the candidates, the salary obtained for tidying up the garden would improve the quality of her life to the greatest extent. It would allow her to treat a chronic disease which she got in her childhood (Sen, 2001, pp. 54–55).

To select an employee, Annapurna adopts a criterion of hiring the poorest person. The choice is seemingly simple—Dinu has the lowest income of the three. However, if we apply the criterion of happiness, the job has the highest value to Bishano. And if we consider whose life it would impact the most, the gardener’s job should go to Rogini—the income could allow her to cure the disease and so, improve her standard of living the most. Advocating the choice of Rogini, Sen argues with the claims founded on the resource egalitarianism, from which it would follow that Dinu is the poorest person. In addition, the philosopher disagrees with the perspective adopted by the advocates of utilitarianism, to whom Bishano is in the worst situation because he is the least happy of all (Sen, 2001).

⁸ The data of GUS [Główny Urząd Statystyczny: Central Statistical Office] shows that in 1970, there were 479,000 passenger cars registered in Poland. In 2011, the number of registered passenger vehicles amounted to 18,125,000 (Andrzejczak, 2012, pp. 25–26).

⁹ According to the GUS data, in 2015, 75.8% of households in Poland had the Internet access, and in 2006 the Internet connection rate dropped to 35.9%.

The parable is of moral character—it demonstrates that in the study of poverty, the impoverished should not be compared with the rich but with other poor people since—as pointed out by Sen—one can be poor in various ways (Zwarthoed, 2012, p. 39). The example illustrates that notion of poverty should be approached from the ethical perspective. At the same time, the parable highlights the fact that whom we perceive as the poorest person varies depending on the adopted criterion (Zwarthoed, 2012, pp. 40–43):

- (1) individual earnings—Dinu,
- (2) well-being/happiness—Bishano,
- (3) benefits coming from the received salary—Rogini (the salary will allow her to cure her disease).

Sen criticizes measuring inequalities in terms of income.¹⁰ Instead, he proposes an evaluation of inequalities using the categories of *capability* as well as *functionings* and the capability to function. What is worth noting in Sen's concept is that functionings are always represented in the form of verbs reflecting the subject-resource relation (Zwarthoed, 2012, pp. 38, 50). Sen (2001, p. 20) asserts:

[...] if our attention is shifted from an exclusive concentration on income poverty to the more inclusive idea of capability deprivation, we can better understand the poverty of human lives and freedoms in terms of a different informational base (involving statistics of a kind that the income perspective tends to crowd out as a reference point for policy analysis). The role of income and wealth—important as it is along with other influences—must be integrated into a broader and fuller picture of success and deprivation.

It is therefore worth asking the following question: why an income-wise description of poverty does not accurately reflect the situation of poor people? In Sen's opinion, income is a relative indicator, which does not faithfully mirror the quality of life. With an income of X amount in a country with a high standard of living, one can be considered a poor person if such goods as a mobile phone or a car are required to participate actively in social life. In a less affluent country, however, a person with the same income can lead a fully satisfying life, being a member of the middle or upper-middle class. The reason for this is the fact that the lack of such goods as TV sets, cars or computers is less apparent in poorer countries (Bagiński, 2007, p. 64).

The analysis of income inequality does not reflect the real inequality of opportunity. The capabilities of transforming income into real possibilities vary for each person. They depend on many physical and social features that characterize individuals and influence their lives (Sen, 2000, p. 43). In his considerations, Sen repeatedly refers to the case of disabled people to prove that an assumption about the uniformity of human needs is false (Sen, 2000, p. 43). The actual capabilities of a disabled person are often limited, even if he or she has more primary goods than others (e.g. higher income). Hence, according to Sen, the income assessment should be made basing on the sets of products and services that are available to

¹⁰ More on the indicators of the economic growth in Sen, Fitoussi & Stiglitz (2013).

a given person (2000, p. 50). In the parable of Annapurna, Rogini exemplifies a person with limited opportunities, who due to her illness can undertake solely simple tasks, as opposed to Dinu and Bishano.

Among the arguments for the assessment of poverty in terms of capabilities, Sen (2001, pp. 87–88) enumerates:

- (1) the analysis of human capabilities focuses on significant deprivations rather than instrumental categories, such as the amount of income;
- (2) that poverty is associated with many other factors – not only with insufficient income. These factors also include: health, age, sex or place of residence;
- (3) the potential to convert the income into real opportunities is not the same in every community.

The concept of capability is rooted in deliberations of Aristotle¹¹, who investigating the nature of human happiness, formulated the terms: *ergon* (action, work, function) and *hexis* (permanent disposition). Aristotle observes that despite the ability to define happiness, a man is not able to capture its essence. A combination of Aristotelian definition of happiness and function contributed to adding a qualitative dimension to the concept of “possessing”. As a result, it was demonstrated that the range of human opportunities is vast, and a man can own as well as being deprived of many goods and services, e.g. housing or education (Zwarthoed, 2012, pp. 44–47).

A basic notion connected with the concept of human capabilities is that of functionings, i.e. the choice of available opportunities.

The relevant functionings—states Sen (2000, p. 55)—can vary from such elementary things as being adequately nourished, being in good health, avoiding escapable morbidity and premature mortality, etc., to more complex achievements such as being happy, having self-respect, taking a part in the life of the community, and so on.

The set of available vectors of functionings determines the existence of a given individual as it reflects “the person’s freedom to lead one type of life or another”, just like the budget set shows the configuration of goods that a consumer can purchase (Sen, 2000, p. 55–56). Figure 1 depicts the components of the human capability approach.

¹¹ Sen drew his inspiration mainly from *The Nicomachean Ethics*, in which it is stated: “(...) wealth is evidently not the good we are seeking; for it is merely useful and for the sake of something else”. Cf. Arystoteles, 1982, pp. 11–12.

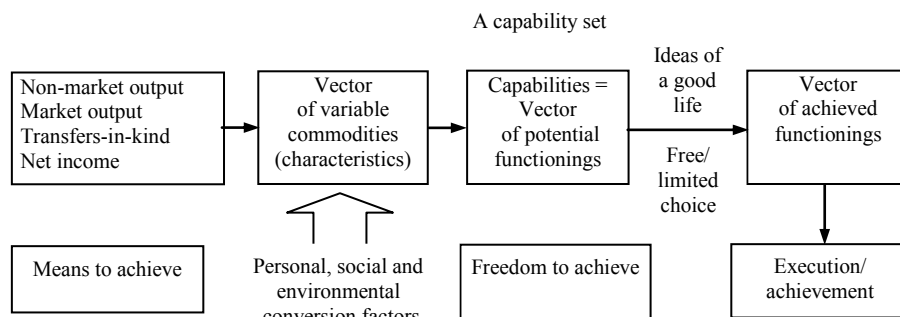


Figure 1. The components of the human capability approach

Note. Adapted from "Niepełnosprawność w świetle koncepcji zorientowanej na ludzkie możliwości," by M. A. Paszkowicz, 2014, *Prakseologia*, 156, p. 208.

When in the summer of 1997 a Japanese newspaper asked Sen what he thought was the greatest achievement of the 20th century, the Indian economist replied that it was the spread of democracy. In his opinion, the democratic system and political freedom foster the development and the eradication of poverty (Sen, 1999, p. 3). In his book *Development as Freedom*, he notes that

Development requires the removal of major sources of unfreedom: poverty as well as tyranny, poor economic opportunities as well as systematic social deprivation, neglect of public facilities as well as intolerance or overactivity of repressive states. (2001, p. 3)

A similar view is expressed by Milton and Rose Friedman, who state that "[...] no external force, no coercion, no violation of freedom is necessary to produce cooperation among individuals all of whom can benefit" (Friedman & Friedman, 2006, p. 1). As an example of the positive influence of the synthesis of political and economic freedom, they cite an accelerated process of development in the United States and Great Britain in the 19th century. In the book *Free to choose*, we can also read that

[f]reedom means diversity but also mobility. It preserves the opportunity for today's disadvantaged to become tomorrow's privileged and, in the process, enables almost everyone, from top to bottom, to enjoy a fuller and richer life. (Friedman & Friedman, 2006, p. 142)

The importance of freedom as a constituent of progress is also emphasised by Friedrich August von Hayek. According to Hayek, the market economy is a system marked by spontaneous order. He argues that the market, like the natural world, does not function effectively if it has an imposed hierarchy of objectives or works under constraints. Then, freedom is a necessary stimulus for further development (cf. Godłów-Legiędź, 1992, pp. 23–24).

However, should the poor be preoccupied with political freedom? Three major claims can be made against the democratic system and political freedom in developing countries (Sen, 1999, p. 13):

- (1) the Lee hypothesis—a belief that authoritarian countries can achieve a high level of economic growth (e.g. China), whereas democracy inhibits the economic growth;
- (2) conflict of priorities—a conviction that economic needs of the poor are more important to them than their political rights;
- (3) the view that freedom and democracy are exclusively Western values and are contradictory to other value systems, especially those of Asia.

Deepak Lal observes that during the economic expansion of the West, developing civilisations had to choose a particular path of development. In his view, the first option was imitation, pursuant to which the material values of the West should be adopted along with the technology that could unlock the military and economic potential of a country. For instance, Japan was the country that followed this path. An alternative path was the isolation and protection of traditional values from modernization, and it was the choice made by Gandhi. The third alternative was an attempt to reach a compromise between tradition and modernity—the path undertaken by China. Lal’s research proves that modernization does not have to entail the erosion of traditional values and the compliance with the Western moral code (Matera & Matera, 2011, pp. 60–63).

Sen maintains that the aforementioned claims are unfounded and based on selective and limited research. The fact that countries with a multi-party democratic system never face severe famine supports the thesis that democracy and political freedom help to alleviate poverty.¹² Although the waves of hunger usually do affect no more than 5% of the population of a given country, Sen insists that the parties have political reasons to remedy this unfavourable situation. In totalitarian systems, millions dying of hunger do not contribute to the prosperity of a dictator/the establishment. If a democratically elected government does not handle the crisis, it will automatically lose the support of a significant part of the electorate. What is more, people have inherent empathy and a need to respond to the suffering of others and thus, only a small part of the population would vote for the party that remains insensitive to the plight of the poorest (Sen, 1995, pp. 16–17).

4. Conclusions

“Don’t ask me what poverty is because you have met it outside my house. Look at the house and count the number of holes. Look at the utensils and the clothes I am wearing. Look at everything and write what you see. What you see is poverty” (World Bank, 2001, p. 3). The words of a poor man from Kenya convey the essence of poverty. It is a multifaceted phenomenon, which should be examined by

¹² It applies to both, rich and relatively poor countries (like India or Botswana).

identifying the actual lacks and problems that the impoverished face. Therefore, while addressing the issue of poverty, one has to take into account many factors, both material (e.g. possessions) and spiritual ones (e.g. indignity, a sense of helplessness).

Limiting the reflection on the causes of poverty to a few selected components may result in a misperception of this phenomenon and of the welfare, and in turn, the aid may not reach those who need it most. The well-being means something completely different to a person raised in a rich society with a high standard of life than to a person living in a lesser developed country.

The analysis of poverty based on Sen's capability approach depicts the situation of the poor more accurately. The scholar shows that public debate should reflect on what the poor people are lacking. The notions of capability and functionings have added a qualitative and ethical dimension to the concept of poverty and reveal the actual, non-instrumental factors conditioning the impoverishment of a person. The Indian philosopher spotlights another aspect of poverty and the real problems of people affected by this phenomenon. For this reason, one must agree with the opinion of Robert Solow, who proclaimed Sen "the conscience of the economics profession" (after Nasar, 1998).

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