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Poverty in a rich man's world

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A Ph.D. dissertation by

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Because Rawls

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Abstract

For the first time in the history of the country, Denmark institutionalised an official poverty line in 2013. The poverty line was short-lived, however, and already two years after its inception, it was abandoned again, after several heated discussion about what it can mean to be poor in a wealthy country like Denmark. It is safe to say that the official poverty measure never managed to achieve the support that was necessary to bring any kind of authoritative gravity to it. It arguably failed at the most fundamental level; it measured something half the political landscape did not recognise as *poverty*. It reflected a too simplistic understanding of what it can mean to be poor in a wealthy country, the criticism went, with an excessive focus on monetary resources and with no real grounding in the actual living conditions of the worst-off groups in society.

This thesis is about poverty in a rich man's world. It is an attempt to understand how we can construct a conception of poverty that can serve a useful purpose in our political vocabulary. I argue that the poverty concept is best understood as an adequacy standard against which public policy should be developed and justified. I take my departure in political theory and try to bring some of its insights to bear on the poverty concept. My most fundamental argument is that the traditional theoretical framework of understanding poverty as a causal relationship between the lack of resources and unacceptably low standards of living, is fully adequate to grasp the most important questions relating to the poverty concept, and that it points to a research task that is both fruitful and complex. More specifically, I argue that in the context of wealthy countries, poverty is best understood as one of the necessary conditions for citizens to develop into and maintain their status as free and equal. As one of the necessary conditions, poverty distinguishes itself from other necessary conditions in that it covers the restricted domain that relates to a critical lack of money. As such, a monetary poverty threshold can, contrary to popular belief, in principle at least, be a perfectly reasonable reflection of the underlying concept.

My argument goes against a prevalent strand of thinking in contemporary poverty research, often self-described as 'multidimensional approaches'. These approaches conceptualise poverty with money relegated to a subordinate role and instead assess poverty directly by way of living standards. As such, these approaches do not only conform to many arguments often mobilised in public discourse, including the most

weighty arguments against the former official Danish poverty threshold, they also challenge the traditional theoretical framework. It is not yet clear whether these multidimensional approaches present one unified theoretical idea and what the implications are of thinking about poverty in that way. It is clear, however, that these approaches have been heavily inspired by the capabilities approach, and in particular by Amartya Sen's idea of 'poverty as capability deprivation' (Sen, 2000). Multidimensional approaches are often pitched in contrast to resourcist conceptions of poverty - where John Rawls can be thought to provide the necessary theoretical support - that assess and evaluate poverty on the basis of people's possession of resources. These conceptions have often been criticised for being unable to deal with the complexity of disadvantage in modern societies, mimicking Sen's criticisms of Rawls in the political theoretical literature. As such, major traditions in political theory are thought to give rise to fundamentally distinct conceptions of poverty, with Sen and Rawls as paradigm examples of the different approaches. This thesis is partly an investigation of the theoretical underpinning of the multidimensional approaches and the extent to which it can be thought to provide good reasons to revise our understanding of the poverty concept.

I argue that it cannot. The differences between political theoretical approaches like Sen's and Rawls' do not cut very deep with respect to how we should think of the poverty concept from within those theoretical frameworks. What a political theoretical approach to understanding poverty can teach us, is that the most important questions that must be addressed in the specification of any conception of poverty can in fact be systematically grasped under a unified normative framework. The answers we must provide to arrive at a plausible understanding of poverty, must be supported by independent conceptual and moral argument that does not originate from a deeper theoretical framework. Thus, the perceived inadequacies of the traditional theoretical framework are not genuine inadequacies once we subscribe to a sufficiently nuanced version of such framework. One can therefore conclude that the move towards multidimensional poverty approaches do not present a novel theoretical innovation of traditional ways of thinking about poverty – at least in the context of wealthy countries today.

1 Introduction

Any state that claims to respect the humanity of its citizens, must justify its policies according to adequacy standards that are expressive of the freedom and equality of all citizens. The avoidance of poverty is one such standard, and indeed, a special one. Poverty is a concept that occupies - and has always occupied - a special place in our political vocabulary. This remains true today, even in wealthier parts of the world, despite living standards being at an unprecedented historical high.

The concept of poverty is both a descriptive and a normative concept. When we describe someone as poor, we are not merely making an empirical observation about that person's living standards, we are also making an evaluative claim that there is something unacceptable about that person's situation. Unlike inequality where certain types, within certain ranges, can be tolerable or perhaps even be desirable, few people today – save a few libertarians – would claim poverty to be a tolerable feature of modern, wealthy societies, and fewer still a desirable one. Regardless of our political orientation, we cannot remain indifferent to the fact that people with whom we share political and social institutions live under conditions of poverty, properly understood. As such, the concept of poverty is a standard of social progress; a standard that no one should be allowed to fall below, and against which we can benchmark our successes and failures in realising our most fundamental values of freedom and equality for all.

At the face of it, however, the poverty concept is fraught with disagreement. In Denmark, for instance, we have seen this disagreement unfold over several occasions in the last years; first in a series of heated public debates after the living standards of several supposedly poor citizens – or spoiled or lazy, depending on one's viewpoint – was exposed to the public. Subsequently, for the first time in its history, Denmark introduced an official poverty measure in 2013, according to which approximately 0.7 % of the population was regarded as poor. The poverty line was short-lived, however, and was abandoned only two years after its institutionalisation, after a change in government. The left and the right could simply not come to agreement about what it means to be poor in a country like Denmark today.

Despite such disagreement, we can perhaps find optimism in the fact that there is widespread agreement that poverty is a moral wrong that ought to be eliminated.

Such agreement provides some hope that an understanding of poverty can be developed that can translate this underlying moral agreement into a workable concept that can ultimately lead to progressive political action. However, the same feature of the concept that makes it morally powerful, also presents itself as a distinct challenge. Whenever the material conditions underlying the concept are specified in any level of detail necessary to mobilise political action, we risk that the agreement about its status as an unacceptable moral wrong reveals itself as mere rhetoric; a concept simply defined as morally unacceptable, but empty as to the specific conditions qualifying its status as such.

No doubt these thoughts are put too strongly. In politics, there are few absolute demands, and it is not clear that the avoidance of poverty is one of them. Or, to put it more precisely; how strong the moral imperative is, depends on how we understand the problem, and it is not obvious that we will want to understand it so strongly that its avoidance presents itself as an absolute moral demand. The poverty concept, like any other concept, is not handed to us through cosmic interpretation, but is constructed by us specifically to serve a useful purpose.

To be sure, it is not difficult to imagine a poverty concept that would have such authoritative moral status. We just have to squeeze the lemon hard enough. When the poverty concept revolves around the idea of subsistence, for instance, there can be no question that the avoidance of poverty presents itself as an absolute moral imperative – at the very least in the countries where such extreme scarcity is avoidable without provoking tragedies of similar dimensions. If we take our commitment to the ideals of freedom and equality of all to mean anything, it is beyond dispute that no one should be left to starve in the streets. However, any sensible approach to the poverty concept today, must take seriously, not just the limits, but also the potential of what we can hope to achieve with it. We must look for a more progressive ideal that can be encapsulated within the concept.

This thesis is about poverty in a rich man's world. I want to understand the conditions under which it makes sense to claim that a person is poor, and, on that basis, to understand how we should proceed to measure poverty. It is a theoretical thesis, and as such, I will not try to construct an actual poverty measure. My approach is more abstract; to answer the question presupposes many things – it presupposes that we have a theoretical idea of what poverty is, the normative and scientific status of the concept, how it relates to other normative concepts and so on - and to understand those things is the aim of this thesis.

I will, by and large, defend what I take to be a common-sense understanding of the concept. Thus, with a few caveats, the argument I defend is this: In the context of developed, wealthy countries, like Denmark, poverty is best understood as the problem of lacking the money necessary to develop into, and maintain our status as, free and equal citizens, to a minimally adequate extent. While the few caveats are important, they do not change the main idea, that because poverty is about lacking money to achieve the functionings that are necessary conditions for the proper expression of our freedom and equality, a monetary poverty threshold can be, in principle at least, a perfectly reasonable reflection of the underlying concept. More generally, I defend the idea that the traditional framework we have available to us, in understanding poverty as a causal relationship between the lack of resources and living standards, is fully adequate, and indeed, more suitable than recent attempts to modify and innovate it.

To understand this claim, we need a rough idea of the subject of poverty research and its history, and the contours of the main theoretical struggle today. Historical interpretations of the poverty concept were based on the notion of subsistence. For Benjamin Seebohm Rowntree, who conducted arguably the first systematic studies of poverty in the city of York in the beginning of the 1900's, poverty was exactly a question about lacking resources so severely so as to threaten the physical integrity of those struck by it (Rowntree, 1901). Most people today, certainly in poverty research - if not also in public discourse - have abandoned the idea that poverty is best understood through the notion of subsistence, regardless of the particular context to which it is applied. The familiar, though perhaps somewhat misleading notion of 'relative poverty', is a development of the idea that we cannot adequately understand the character and formation of our most important needs, let alone the resource-based requirements to satisfy them, without understanding the conventions that structure the conditions of membership and status in any particular society at any particular point in time. In the intellectual history, such idea dates back to at least Rousseau, Adam Smith and Marx, but in the area of poverty research, it was the British sociologist Peter Townsend who led the transition from a conception of poverty revolving around the notion of subsistence to a conception revolving around the notion of 'relative deprivation', most particularly with the seminal work *Poverty in the United Kingdom* (Townsend, 1979).

Townsend famously came to define poverty in the following way:

“Individuals, families and groups in the population can be said to be in poverty when they lack the resources to obtain the types of diet, participate in the activities, and have the living conditions and amenities which are customary, or at least widely encouraged or approved, in the societies to which they belong. Their resources are so seriously below those commanded by the average individual or family that they are, in effect, excluded from ordinary patterns, customs and activities” (Townsend, 1979: 31).

Townsend was ground-breaking for poverty research because he managed to fully incorporate, conceptually and methodologically, the idea that our objective needs can only sensibly be understood in relation to the surrounding context that specifies the nature of the various roles that we are expected to perform. Townsend has been deeply influential and has left visible traces in large parts of poverty research, especially in a European context. He is the father of the so-called *consensual approach* that Mack and Lansley (1985) developed with heavy inspiration from his work, and that have formed the backbone of many large poverty analyses since then, including the major surveys of *Poverty and Social Exclusion* and its predecessors in the UK (Mack & Lansley, 2015; Pantazis, Gordon & Levitas, 2006). Similarly, the incorporation of deprivation modules in large scale European surveys, such as the European Statistics on Income and Living Conditions (EU-SILC) bear clear resemblances to Townsend’s work, and he is arguably – rightly or wrongly – also perceived to be the theoretical originator of the prevalent income measures used by the OECD in which poverty is measured as a fraction of the median income (OECD, 2008).

Different theoretical struggles have animated different eras of poverty research. In the progress from Rowntree to Townsend, the most important discussions pertained to the question of whether poverty should be understood as an absolute or a relative phenomenon. That discussion is now dead. Or, it should be, at least. No nuanced perspective on the meaning of poverty will claim poverty to be absolute in the sense that the relevant needs of any person can be specified independently of the context in which they live. Similarly, no nuanced perspective will claim that poverty is simply a sub-field under the broader question of inequality, simply relating to the lower end of the socio-economic distribution. Poverty is, and has always been, about unmet needs, but these needs are unintelligible independent of a contextual setting.

The theoretical struggle that animates poverty research today is different. Though there are many nuances to Townsend’s concept of relative deprivation, one thing

that remained central to his way of thinking was the centrality of resources in the poverty concept. Although Townsend broadened our understanding of the poverty concept, he continued to define and measure people as poor exclusively based on their possession of (monetary) resources. In recent years, there has been a growing concern with placing such strong focus on lack of money at the core of the concept. From such concerns, a branch of newer approaches, often self-described as ‘multi-dimensional approaches’, has emerged. The common denominator of these approaches is that they are sceptical of what they take to be an excessive focus on money, and call attention instead to a wider range of dimensions that are important for human well-being. Putting too much weight on resources, the idea goes, misguides our attention to things that are only instrumentally valuable, instead of focusing on the things that really matter. Thus, the criticism goes, traditional concepts that allow money a central role in the concept, such as the Townsendian concept, are unable to deal with the depth and complexity of human diversity and suffering in modern societies.

There has been a plethora of recent contributions that self-describe as multidimensional approaches to poverty, chiefly in economics, but also in sociology. Some are conceptual and some are empirical applications, both in developing countries and in developed countries.¹ There have been special issues devoted to multidimensional poverty analysis in several important journals, including *Social Indicators Research* (2013: 112/2) and *Econometric Review* (2013: 32/1). And on top of that, a large research centre has been formed in 2007, the *Oxford Poverty and Human Development Initiative* (OPHI), which has as its explicit aim “to build and advance a more systematic methodological and economic framework for reducing multidimensional poverty”.²

I am not sure whether Hick’s description in 2012, that there is an “unresolved tension within poverty analysis between a desire to emphasise a broad measure of multidimensional poverty … and an insistence on conceptualising poverty in narrower terms around a core concept of resources” (Hick, 2012: 292), is more accurate than

1 There are too many to list here. Some of the most important conceptual contributions include Bourguignon & Chakravarty (2003), Alkire & Foster (2011a; 2011b), Ravallion (2011). For two collections of mostly empirical contributions, see Kakwani and Silber (2007; 2008), and for recent applications to developed countries, see, for instance, Coromaldi & Zoli (2012), Whelan, Nolan & Maître (2014), Wagle (2014), Hick (2014b; 2015) and Suppa (2015).

2 From their website: <http://www.ophi.org.uk/about/>

his description in 2015, that “poverty analysis is currently undergoing a multidimensional turn” (Hick, 2015: 277). It is clear, however, that there is a branch of recent approaches that, in light of what they perceive to be inadequacies of ‘traditional’ ways of understanding the concept, attempt to redefine the way we understand and measure poverty.

‘Multidimensional poverty’ has become somewhat of a buzzword, but it is far from clear whether it is one idea – let alone a coherent idea - or what the implications are of thinking about poverty in that way. As such, it is somewhat difficult to state the unifying idea precisely, although it is clear that these approaches are formulated in opposition to poverty conceptions that give money a prevalent role. It is often claimed that the poverty concept must be ‘broadened out’, that the poverty concept is about ‘more than money’, and that it must incorporate “a wider set of dimensions which reflect the many different ways in which human life can be impoverished” (Hick, 2015: 277).

Importantly, it is clear that these approaches have been inspired in particular by Sen’s idea of ‘poverty as capability deprivation’ (Sen, 2000; 2009), and it is from the capabilities framework that these approaches find their philosophical support. However, the capability approach can give meaning to the idea of poverty as a multidimensional phenomenon in various ways, and it is important that we are careful in distinguishing between them, because they are distinct and none of them follow from the others. There are at least five distinct ideas that can be teased out as potential innovations of the multidimensional approaches rooted in a capability framework; (i) that poverty is about multiple sources of deprivation, not necessarily related to a lack of resources, (ii) that the underlying problem with poverty is that it is a threat to a plurality of functionings, (iii) that the traditional focus on money is too narrow an interpretation of resources, (iv) that focusing on lack of resources or money ignores important variations in need, and (v) that lack of income, or lack of money more broadly, is an inadequate empirical indicator of poverty, and should be supplemented by a plurality of other indicators of living standards. These ideas can potentially throw conventional ways of understanding and measuring poverty into question, and can thus have widespread consequences for how we come to perceive the nature of poverty, and thus, what kind of benchmark we come to evaluate our political efforts according to. The ideas that motivate these approaches and their proposed solutions thus deserve careful attention.

Interestingly, the move towards multidimensional poverty analysis often seems driven by a normative motivation. For instance, Sabina Alkire and colleagues claim that “one key motivation for measuring multidimensional poverty is ethical. ... Poverty measures, to merit their name, must reflect the multifaceted nature of poverty itself” (Alkire et. al., 2015: 3). And they continue, quoting Sen, that “human lives are battered and diminished in all kinds of different ways and the first task ... is to acknowledge that deprivations of very different kinds have to be accommodated within a general overarching framework” (Sen, 2000: 18 in Alkire et. al., 2015: 3). Similarly, Rod Hick contrasts the ‘traditional’ approaches that are grounded in the purely conceptual question ‘what is poverty?’, with the multidimensional approaches, that are grounded in the ethical question ‘what matters?’ (Hick, 2014a: 305). I find such contrast wholly unacceptable. While I agree that we must understand poverty as a normative concept, and construct it specifically as such, a deeper engagement with the underlying philosophical frameworks that could be thought to give rise to such different concepts, reveals that there is in fact a deep underlying unity in the concept.

With the clear exception of Sen, political theory has been relatively silent on the question of how best to understand the nature of poverty.³ Of course, there are some resources in the political theoretical literature to tap on, especially if one diverges into related questions such as human rights (for instance, Shue, 1980 and Beitz, 2009), sufficientarian doctrines (which have clear expression in Frankfurt, 1987) and also the broader question of disadvantage (for instance, Nussbaum, 2000 and Wolff & De-Shalit, 2007). However, very few have tried to deal specifically with what could be entailed in the poverty concept, and to grapple specifically with the questions that arise in the conceptual analysis of poverty. This is unfortunate for poverty research as well as for public discourse, as the poverty concept stands in need of conceptual clarity. Both academic and popular discourses are filled with conceptual confusion – and the recent rise in multidimensional poverty approaches has only aggravated that trend - and one could hope that systematic conceptual analysis could at least help separate genuine disagreement from mere confusion. It is also unfortunate for political theory, because the poverty concept is one of the areas in which its insights can be brought to bear on an issue of substantial importance.

3 For a recent contribution in a mainstream political theoretical journal, see Ci (2013). Wolff, Lamb & Zur-Szpiro (2015) provide a recent review of philosophical approaches, reaching the same conclusion that in the philosophical literature, direct engagement with the poverty concept has been relatively absent.

With that said, I find that many of the necessary theoretical resources to understand the poverty concept, at least as a political concept, can be found in Rawls (1971, 1993, 2001), though Rawls himself never had any explicit considerations on the nature of poverty.⁴ The closest we come is his remarks that any liberal conception of justice, based on the criterion of reciprocity, must include “measures ensuring for all citizens adequate all-purpose means to make effective use of their freedoms” (Rawls, 1997: 774). Though often lurking in the background, Rawlsian ideas of pluralism, the conception of citizens as free and equal, primary goods, overlapping consensus and public reason, provide useful theoretical substance to inform much of the analysis. I could neither have reached the conclusions I reach, nor defended them as I do, without a Rawlsian framework in the background.

Given that the poverty concept is a normative one, some normative analysis is required to understand how we can best construct the concept so that the evaluative claim we associate with the concept is warranted by the empirical conditions we regard as constitutive of being in poverty. Obviously, this is not to deny that poverty is also a descriptive concept. Part of the beauty, and part of the difficulty with the poverty concept is that it overlaps the space of both morality and various social science disciplines. The trick for normative conceptual analysis, as I see it, is to understand how these various aspects can be grasped under a unified framework that gives proper due to both the moral and descriptive aspects of the concept.

It is important that we are aware of what kind of conceptual analysis this is, and what we can expect from it. First, it is neither about conceptual nor intellectual history. I make no attempt to conduct a systematic investigation of how various actors throughout history and in different contexts have in fact understood the concept.⁵ The nature of the question I will attempt to answer is different, and it relates to how we *ought to* understand the concept, not how this or that person has in fact understood it. How people have in fact understood the concept, or do in fact understand the concept, is of interest to me, in this thesis, only insofar as such understandings restrict what would be sensible ways of understanding the concept today.

Secondly, it is primarily conceptual analysis that relates to how we ought to understand the poverty concept, not normative arguments for and against our duties to

4 Henceforth, I shall refer to *Theory* as TJ (and always to the revised edition), *Political Liberalism* as PL, and *Justice as Fairness: A Restatement* as JF.

5 For such analysis, see for instance Spicker (2007) and Misturelli & Hefferman (2008).

wards the poor (taken as an already defined group). With that said, however, engaging with such normative arguments cannot be avoided entirely, partly because one of the important aspects of understanding how we should construct the poverty concept depends on the nature of the moral claim we attach to it. Such theoretical construction presupposes some normative arguments about the nature and extent of our responsibilities to one another. But I will engage with such questions only insofar as they are necessary to understand how we ought to understand the concept in the first place.

The ambition is to contribute to a conceptual map of disadvantage that can ultimately be useful for the way we understand the various sources of disadvantage most urgent to contemporary wealthy societies, and how they relate to one another. In the conceptual universe that I have in mind, poverty is one concept among many, and the task for conceptual analysis is to construct the conceptual map that describes these concepts and their relationship to one another in a systematic way. In that larger project, I see myself only engaged in the small part that tries to work out what role the poverty concept can play without overstepping the boundaries of the spaces that are best filled by other concepts.

The specific way I propose to understand the concept does not, of course, have any special standing outside the democratic debate. So to avoid misunderstanding from the outset; to specify how we ought to perceive the poverty concept is not an attempt to take the poverty concept out of politics, to fix it once and for all, or dismiss all alternative ways of understanding it. On the contrary, it is an input to such debate, and I hope it can contribute to heighten the quality of it.⁶

1.1 Main argument and outline of the thesis

The way we should understand the nature of poverty, and the gravity of the moral claim attached to it, is not set in stone, but is up for construction. And how we want to construct it, depends on the context in which it is applied and to what purpose. Or to put it differently, how we can sensibly speak of poverty depends partly on who speaks, to whom, in what context and with what purpose. Whether you are a spiritual leader addressing your followers, a cultural figure, a parent – whatever role you may find yourself in, and whomever you are trying to address – you may find

6 I will return to a more detailed discussion of the normative status of my contribution in chapter 3.