

BOOK REVIEW

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Amartya Kumar Sen: *Inequality Reexamined*

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Inequality Reexamined is a book published in 1992 by the Indian Nobel Prize winner (Economics 1998) Amartya Kumar Sen. In this book Sen considers a different perspective to look at the notion of inequality. The basic question he asks is: inequality of what? He answers this basic question by advocating his preferred notion of equality which is based on the capability to function. While addressing the problem of equality Sen is concerned with two fundamental elements to rethink: (1) why equality, and (2) equality of what. For the first, the idea of equality is considered in its two dimensions of the heterogeneity of human beings and the multiplicity of variables in terms of which equality can be judged. Specifically, these components lead to divergences in the assessment of equality in terms of different variables. For the second question, Sen critically evaluates theories projected by other thinkers and theorists such as John Rawls, Thomas Nagel, Ronald Dworkin and Robert Nozick in an attempt to understand equality.

In making a re-examination of inequality in our times, Sen proposes a paradigm shift beyond what others consider as income equality and equality in distribution of resources. Sen incorporates the heterogeneity of human beings as an evaluative space for inequality. His perspective is about equality within a pluralistic society, with human, cultural and religious diversity. According to him, human diversities are the results of variations in human needs, capacities, capabilities and interests due to external characteristics and circumstances. Sen argues that:

We begin life with different endowments of inherited wealth and liabilities. We live in different natural environments – some more hostile than others. The societies and the communities to which we belong offer very different opportunities as to what we can or cannot do. The epidemiological factors in the region in which we live can profoundly affect our health and well-being (1992: 20).

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By broadening the evaluative space of measuring inequality within society Sen recognizes personal heterogeneities and physical characteristics in sex, age, physical and mental abilities as focal variables for measuring inequality (1992: 20). Here, Sen confronts John Rawls equality of incomes by giving an example of a situation where a disabled man and able-bodied man are given equal incomes. The disabled person cannot function in the way the able-bodied person can. The able-bodied man has more functioning ability and well-being than the disabled man.

In fact, our global society has a great deal of diversity caused by cultural, religious, social and natural environment surrounding us. A human being is nurtured by these elements. So, these diversities according to Sen answer the question of ‘why equality’. To understand Sen’s claim here, we can think of any society where female children are denied formal education as a necessary tool for their empowerment. Thus, female children in such a society have fewer capabilities than female children in other societies where education is a priority for all children regardless of gender. Sen’s approach on inequality has a wider evaluative space as it looks at the impediments to human beings achieving well-being and individual capabilities.

Sen critiques two main theories which have dealt with the problem of inequality, namely, the utilitarian theory and John Rawls’ theory. The utilitarian approach was proposed by a British moral and legal philosopher Jeremy Bentham and developed by another British philosopher Stuart John Mill. In addressing equality the utilitarian approach has the merit of caring about people: it measures quality of life according to people’s reported feelings about their lives. The utilitarian approach envisages that welfare could be realized as the achievement of a happy state of mind, or could be understood as utility in terms of satisfaction of desire. Bentham’s principle of utility – the basis of his utilitarian model – advocates that in dealing with equality, policies should focus on promoting the greatest amount of happiness to the individuals in the society. Bentham’s main concern is that the principle of utility would be useful in making judgments pertaining to the public policies directed toward reducing inequalities. In Bentham’s view of the utility principle, before formulating any policy, policy makers must determine the sum total of pain or pleasure that the proposed policies suggest. Bentham suggests that pleasures, and the avoidance of pain, are the ends which the policy maker should take into account.

Sen advances that utilitarian approach on promoting equality has some limitations. Its account fails to capture other aspects that are beyond the satisfaction of individual desires, for instance, participating in the life of the

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community. The utility account fails to capture dimensions of well-being whenever deprived people adapt their desires to their diminished circumstances and knowledge. For instance, a nation can get a very high average or total utility so long as a lot of people are doing quite well, even if a few people at the bottom of the social ladder are suffering greatly. Indeed, the approach justifies the infliction of a very miserable life on an underclass, so long as this strategy raises the average satisfaction level. Another criticism put forward on utilitarianism in regard to promoting equality is narrow consideration of satisfaction as a goal. Satisfaction is usually understood as a state or condition of the person that follows an activity; it is not itself a form of activity, and it can even be achieved without the associated activity. For example, a person can feel satisfied about an activity well done even though he/she has done nothing to realize that activity. Thus, Sen argues that utilitarianism tends to ignore what he calls agency freedom of individuals. It is one's freedom to bring about the achievements one values and which one attempts to produce (Sen, 1992: 57). Sen uses the term 'agent' in the sense of someone who acts and brings about change, and whose achievements can be judged in terms of his/her own values and objectives. Agency freedom views the removal of inequalities, injustices and un-freedoms so as to let people be free in contributing towards their well-being. Agency freedom is attributable to the role of the person as 'doer' and 'active' towards achieved functioning. In short, the utilitarian approach on equality undervalues freedom of individuals in realizing their satisfaction. Yet, for Sen, freedom to choose and act is an end as well as means for the satisfaction of our desires.

Another theory criticized by Sen on question of inequality is John Rawls' theory of justice. Sen criticizes Rawls' theory of the 'primary good' (such as liberties, opportunities, income, wealth, and self-respect) in *A Theory of Justice*. Rawls argues that justice should be a social virtue in any political community. Rawls advances two principles of justice, the 'liberty principle' and the 'principle of equal liberty'. Rawls' principles of justice have the merit of caring greatly about distribution since resources ought to be distributed equally among all citizens. In Rawls' understanding, if those aforementioned principles of justice are followed through formulated policies any society might reduce inequalities. According to Sen, this approach, encounters formidable objections. First of all, income and wealth are not good alternatives for what people are actually 'able to do and to be.' People have different needs for resources, and they also have different abilities to convert resources into proper functions. Some pertinent differences are physical: a child needs more protein than an adult for healthy physical functioning, and a pregnant woman needs more nutrients

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than a non-pregnant woman. Thus, a sensible public policy would not give equal nutrition-related resources to all, but would for example, spend more on the protein needs of children, since the sensible policy goal is not just spreading some money around but giving people the ability to function. Money and resources are just instruments to enable people attain their reasonable functioning or to function effectively as human being.

Another objection to resource based approach on equality is that some of the pertinent differences are created by persistent social inequalities. For instance, in order to put women and men in a similar position with respect to educational opportunity in a society that strongly devalues female education, we will have to spend more on female education than one male education. If we want people with physical disabilities to be able to move around in society as well as able-bodied people, we will need to spend extra resources on them. Amartya Sen then proposes that in order to reduce inequalities it is not only enough to distribute equal resources but to examine critically personal heterogeneities in people. For Sen people have disparate physical characteristics connected with disability, illness, age, or gender, making their needs diverse. For example, an ill person may need more income to fight her illness than a person without such an illness. While the compensation needed for disadvantages will vary, some disadvantages may not be correctable even with more expenditure on treatment or care (p. 64). Thus, a nation in its battle to reduce inequalities should take into account personal heterogeneities among its citizens.

After a critical evaluation of utilitarian and Rawlsian theories on the question of equality, Sen develops the idea that society should promote equality in the space of capabilities. The capabilities approach is based on real questions one must ask while dealing with the problem of inequality: What are people actually 'able to do' and 'to be'? What real opportunities for activity and choice has society given them? What are the social, cultural and religious impediments toward realization of equality in any society? What are the environmental factors hindering people to attain what they value most in their lives? How do political policies and institutions endanger attainment of equality in a given society? And finally, what are the economical factors hindering reduction of inequalities in any given society?

Sen, defines the capability of a person as that which 'reflects the alternative combinations of functionings the person achieves and from which he/she can choose one collection' (p. 31). For Sen, capabilities represent various combinations of functionings (beings and doings) that a person can achieve or could have achieved. Capability is a set of vectors of functionings, reflecting a

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person's freedom to lead one type of life or another. These basic capabilities refer to the freedom to do some of the basic things necessary for one's survival or to keep one out of poverty. Sen considers capabilities as person's abilities to do certain basic things, such as meeting one's nutritional requirements, the ability to move and ability to appear in the public without shame. He suggests that the achieved functionings constitute a person's wellbeing, then the capability to achieve functionings will constitute the person's freedom – the real opportunities – to have wellbeing.

Another concept introduced by Sen is functioning, which is derived from verb 'to function', which generally means to be involved in activity. According to Sen, 'functioning is an achievement of people, that is, what they manage or succeed to be or to do' (pp. 50-51). The definition explicates very clearly that functionings, in fact, refer to the person's achievement in the effort to do something or to be somebody. Thus, functionings are physical or mental states (beings) and activities (doings) that allow people to participate in the life of their society. Functionings range from the elementary physical ones such as being well-nourished, being in good health, being clothed and sheltered, avoiding escapable morbidity and premature mortality, being literate, to the most complex social achievements such as being happy, taking part in the life of the community, having self-respect or being able to appear in the public without shame, participation in social and political life.

In conclusion, the question of inequality is a widely discussed matter these days. Many researches are being conducted to explore its causes, effects and role in hindering reduction of extreme poverty. For instance, the Oxfam briefing paper issued on 10 May 2016, titled "The Time is Now: Building a Human Economy for Africa" contributes to this discourse. The report stresses that inequality is harming the ability of growth to reduce poverty and deliver shared prosperity in Africa. It adds that inequality prevents the emergence of a new middle class. The report also indicates that with growth slowing, the need to tackle inequality is vital. It is vital to provide the opportunities needed for the millions of young people across the continent. The report shows for instance that there is no recognition of and support for reproductive and unpaid work that is mostly performed by women. Sen's proposals in *Inequality Reexamined* remain important even in today's society since he suggests that the problem of inequality should move beyond the distribution of equal wealth, opportunity and income to include expanding individual capabilities in terms of their freedom to realize whatever they value and whatever people have reasons to value. Sen suggests that our policies directed towards reduction of inequality should

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critically evaluate our social affairs, cultural and religious ethos. This critical evaluation should aim at eliminating cases of social exclusion tending to increase inequality in the society.

Sen tends to suggest that giving equal opportunities, income and wealth is not enough to reduce inequality. Rather, the policy makers ought to ask a very fundamental question: ‘do these people have same capabilities to convert those resources into achieved functioning?’ To give an example: most of Sub Saharan African countries have adopted education for all as a way forward to curb vicious cycle of poverty caused by illiteracy and ignorance. But there are other obstacles attached such as cultural traditions where in some tribes female children are denied right to education; also the quality of education in public school is still poor. This is a kind of formal opportunity. Sen argues for ‘valuable choices’ designating that capability approach as another alternative on question of inequality judges a person’s extent of freedom based on what is immediately relevant and important in leading a meaningful life. I

Sen’s book *Inequality Reexamined* is very important especially for poor countries in formulating developmental policies. Its relevance lies in the suggestion that any effective policy directed towards reduction of inequality should aim at realizing what he technically calls ‘elementary functioning’ of individuals such as being literate, being in good health and being well-nourished as much as more complex functioning such as participation in community life, having self respect, participating in public discussions.

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