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What the history of "poverty thinking" means for future "development"

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Contents

People have been thinking about poverty for millennia. The diverse and distinct global history of poverty thinking includes Confucianist, Pan-African and other perspectives. Arguably, Western perspectives on poverty have had the biggest impacts on human development in recent human history.

Here we focus primarily on the journey over the past two centuries of Western thinking on poverty, which has had such a significant role in shaping ideas around poverty within the "international development" discourse of the past 50 years (Paris, 2009; Walker, 2014). From within this convention, we can see that concerns about poverty are closely interwoven with development thinking, and that many of the conceptual roots of contemporary poverty thinking can be traced to Western European concerns with social problems (Hulme, 2012), based in turn on thinking from at least the late Roman Republic over 2000 years ago (Atkins & Osborne, 2006) to the Enlightenment.

In the past 200 years, the literature and thinking on poverty have seen a tremendous transition, from moralistic arguments about the necessary function that poverty performs within society towards a more modern literature that emphasizes the multidimensional nature of poverty. This essay provides a description of how this journey has progressed and positions the current frontiers in approaches and understandings against this historical background.

The origins of poverty in Western thought

> *"The mischievous ambiguity of the word poor" Poor Law Report (1834)*

For millennia, poverty was broadly accepted as a condition that would always be present. It was often portrayed as a circumstance that could happen to anyone (as in *Deuteronomy* 15, probably written 2600 years ago), although those in need were not deserving of help if it arose from their "laziness" or "carelessness", criteria that also appear in the Babylonian Code of Hammurabi, written hundreds of years before the birth of Christianity. That is, poverty was seen as "conjunctural" and those affected through no fault of their own needed "protection".

Episodes of "structural" poverty occurred in which the economic structure of society created impoverishment. During these periods, a distinct category of citizens, "the poor", emerged as a politically influential group demanding special consideration. One such episode in the late Roman period had far-reaching impacts on European poverty law (Osborne, 2006).

Legal criteria for being "poor" and "non-poor", and the list of entitlements and duties that those statuses conferred, arose during the Middle Ages or medieval period. The criteria were conveyed through the Catholic Church's Canon Law – described as the "first modern legal system in Western Europe" (Berman, 1985, p. 86) – and the idea of the Three Estates (the clergy, the nobility, and the peasants), each with its special role. Those ecumenical laws, in turn, informed the secular Elizabethan Poor Laws in the England of the 16th Century and beyond.

In an echo of medieval ideas, some of the early Enlightenment thinkers argued that poverty was a social requisite to enable economic advancement (Ravallion, 2015). Without it, who would farm the land, do the menial labour and populate the armies (Defoe, 1704; Mandeville, 1924)?

During the later Enlightenment, it became clear that national income could expand over extended periods of time – and with it, increased wealth for all of a nation's citizens. In other words, "a rising tide" had the possibility to "raise all boats" (Kennedy, 1963). Thus, poverty's ineluctable nature began to be challenged, and it became progressively seen as a social ill that could be corrected with public action (Ravallion, 2015). Not only would such actions increase a population's moral virtue, but by removing constraints on individuals' freedoms to pursue their own interests, wider social and economic benefits would be delivered to society at large (Rousseau, 1755; A. Smith, 1776; Kant, 1785).

The view that had been held for millennia – that conjunctural poverty could be relieved through protection – was replaced with the historically unprecedented idea that structural poverty might be ended through *promotion* out of poverty. It became possible to imagine that poverty could be eradicated. That imagining came to fruition in visions of the 20th century, if not in poverty's actual eradication (Ravallion, 2011, 2015): the World Bank's motto, "A World Free of Poverty", and SDG 1, "End poverty in all its forms everywhere", are in flat contradiction to the claim in *Deuteronomy* that "there will never cease to be needy within the land".

The analogy with a "rising tide lifting all boats" is useful because arguments from the Enlightenment to the present have tended to oscillate between raising the tide, on the one hand, and making sure that all boats rose with it, on the other. The positive view of Smith (1776) on the potential of economic growth was challenged by Malthus (1798), who argued that the poor would swamp their own boats: as their incomes rose, they would have more children, and thereby impoverish themselves again.

Malthus' argument proved not to hold, but as evidence accumulated over the course of the Industrial Revolution, Enlightenment optimism gave way to the pessimism of Marx (Marx, 1867), who famously argued that the logic of capitalism would lead the owners of capital to repress workers' demands for a share of the productive surplus (not just profits, but other wider benefits as well). Thus, the rising tide floats the boats of the capitalists, whose cresting wake then swamps and overturns the others.

This pattern – of promising to bring prosperity through growth followed by a critical assessment of the usually disappointing outcome – has occurred repeatedly in history.[1] Arguably, the failed promise of the late Roman Republic to deliver prosperity to all citizens led to the definition of "the poor" as a political category (Osborne, 2006). Later, the pathologies of the Industrial Revolution would provide the raw material with which Marx worked. The pattern of overpromising followed by disappointment and more or less radical critique was repeated at least twice in the 20th century, as we discuss below.

These cycles overlay related shifts in thinking: the emergence of economic development and transforming the concept of poverty. Development would enable the elimination of poverty, allowing for a shift from defining poverty in legal terms – who counts as poor and to what relief are they entitled? – to defining poverty in functional terms – what characterizes the "poverty" that we wish to eliminate? While the historical emphasis on legal qualifications for poor relief is still relevant, and continues to shape policy debates (Backer, 1993), the more positive policy agenda of poverty elimination has led to a new emphasis on functional definitions.

Careful sociological analysis of poverty emerged in the 19th century and continued into the early 20th century. In a groundbreaking study of poverty in London, Booth (1903) introduced expenditure thresholds or "poverty lines" – as a reviewer of his work labelled it and as we know it today – to demarcate different intensities of poverty. Rowntree (1901) carried out a similarly careful study for the city of York, in northern England. Despite these steps forward, half a century would follow until what could be considered the most focused and active interrogation of the concept of poverty in human history: the internationalization of development after the Second World War (Ravallion, 2011).

1 Many informed reviews discuss the fluctuating themes of growth, "progress" and prosperity in poverty research (e.g. Arndt et al., 2016; Humphrey, 2006; McKay, 2013; Thorp, 1998).

Poverty in the age of development: 1945–1990

After the end of the Second World War, Europe was devastated. The hot war almost immediately gave way to the Cold War, in which a major theme was demonstrating the comparative ability of capitalism or communism to deliver prosperity.

Among the most influential contributions was Rostow's (1959, 1960) historically motivated *The Stages of Economic Growth*. With the subtitle *A Non-Communist Manifesto,* it explicitly laid out a path of capitalist development as opposed to the communist alternative.

The Cold War was part of the political justification for the Marshall Plan, in which the US invested in rebuilding Western Europe. The success of that plan – which relied on an existing and technologically sophisticated workforce – encouraged grand theorizing about the transformation of "backward" economies into economically "advanced" economies. Particularly influential was Rosenstein-Rodan's (1943) proposal for industrializing eastern and south-eastern Europe.

The period of "high development theory" (Krugman, 1992) in the 1940s and 1950s emphasized the self-reinforcing growth that could occur through scale economies in industry if the industrial sector is both coordinated and of a sufficient size. This remains a stylized fact of economic development (McMillan & Rodrik, 2011).

Because the Cold War was a struggle for dominance between economic and political regimes, development theory expanded together with modernization theory, which posited that economic development was inseparable with democratization and "modern" styles of thought (Inkeles & Smith, 1974; Portes, 1973; Smith & Inkeles, 1966). In Hulme's (2013) words, "Modernisation and growth would ensure that poverty became a residual problem that could be dealt with by social policy or charity."

Claims for the poverty-reducing power of economic growth in the context of the Cold War drew attention to poverty in high-income capitalist countries. In the US, work on poverty income thresholds began in the 1960s, around the time that President Lyndon B. Johnson and his administration launched the "War on Poverty". The official thresholds were developed by a staff economist at the Social Security Administration, Mollie Orshansky (1963, 1965). In her words (Orshansky, 1965, p. 3),

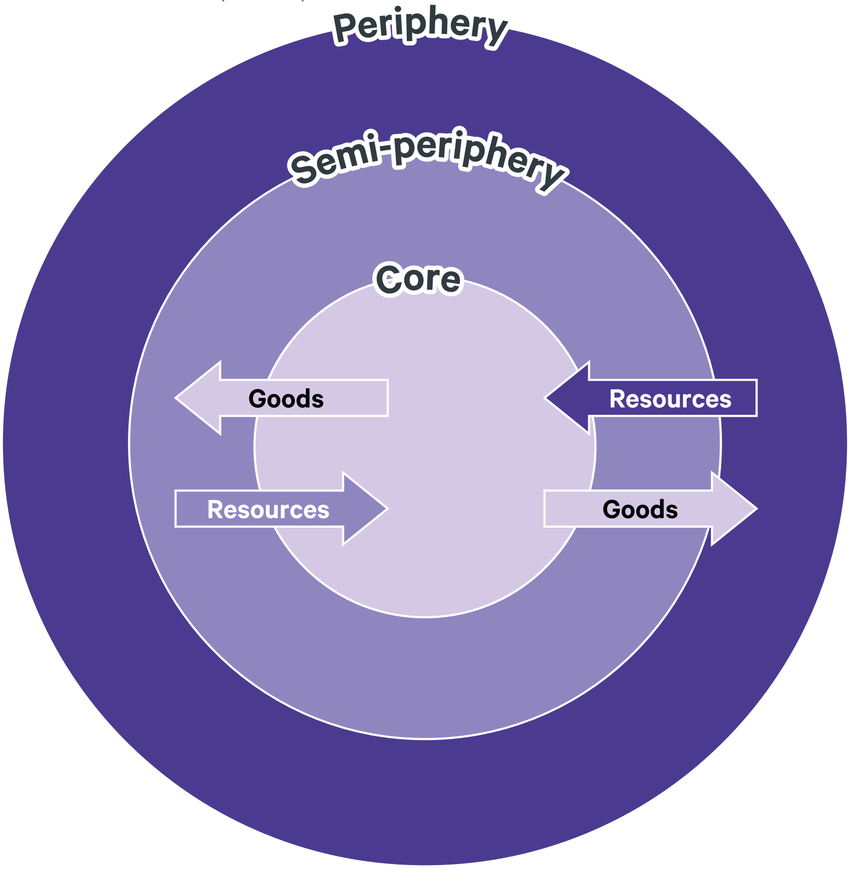
> *A revolution of expectations has taken place in this country as well as abroad. There is now a conviction that everyone has the right to share in the good things of life. Yet there are still many who must watch America's parade of progress from the sidelines, as they wait for their turn – a turn that does not come. The legacy of poverty awaiting many of our children is the same that has been handed down to their parents, but in a time when the boon of prosperity is more general the taste of poverty is more bitter.*

Thus, in keeping with a millennia-old pattern, the experience of prosperity highlighted the plight of those "left behind". Yet while the benefits of economic growth were being questioned within the US, aggregate growth remained the main goal of international development policy. Many of the non-Marxist theorists in this period emphasized structural characteristics of developing countries that prevented free markets (the "price mechanism") from delivering growth. Those ideas gave birth to structuralism, which competed with neoclassical and neo-Marxian theory to inform development theory in the ensuing decades (Chenery, 1975) .

The comparative flexibility of structuralism has allowed it to evolve over time, from pioneering work by Chenery (1960) to increasingly elaborate "gap models" (Taylor, 1994) to the more recent neo-structuralist theory that places greater emphasis on the international context (Ocampo et al., 2009). However, by the early 1970s it was facing a sharp challenge both from neo-Marxians and from within structuralism itself. As a result, it declined in importance. Structuralist theories of different kinds, including the historical "stages of growth" theories of development and modernization would ultimately give way to the dominance of neoclassical theory and neoliberal policies.

Neo-Marxians critiqued the entire development project, arguing that the "underdeveloped" countries were as much a product of industrialization as the "developed" countries. Building on ideas from Latin American structuralism, they pointed to structural disadvantages for developing countries in an evolving international system (Escobar, 2011). As a result, developing countries could not repeat the process followed by the already-industrialized countries, as Rostow argued (Foster-Carter, 1973). From this neo-Marxist perspective (see Figure 1), poverty within the African, Asian and Latin American countries (the periphery) persisted as a consequence of the exploitative nature of their engagement to Europe and North America (the core), which engendered a relationship of dependence and subservience (Frank, 1966; Hadley, 1969).

Figure 1. Structuralism and dependency.



Source: Alauddin (2013)

A major cause of the challenge from within structuralism was the failure of its policy prescriptions to reduce poverty (Harriss, 2013). This critique led to a workshop in Bellagio, Italy, in 1973, a decade after Orshansky's groundbreaking paper, between the World Bank and the Institute of Development Studies at the University of Sussex. The papers were subsequently shared and discussed, resulting in the joint publication *Redistribution with Growth* (Chenery et al., 1979). In keeping with the structuralist strategy of identifying social groups as the unit of analysis, theorists identified "poverty groups" – small farmers, landless labourers and the urban self-employed – with distinct opportunities and constraints. Taken in combination, the inescapable conclusion was that, whether at the level of countries or at the level of individuals within countries, the post-war growth optimism had been misplaced.

The shift in structuralist thinking from a focus on aggregate growth to poverty reduction was part of a broader trend. The UN and the World Bank began to produce outlines of a "basic needs" approach to development planning and programming, whereby donor communities and aid agencies would support national governments to prioritize actions that ensured that disadvantaged people achieved their fundamental requirements (Streeten, 1979; Streeten et al., 1981). In a break from grand historical theories, whether capitalist or socialist, the "human needs" approach "reject[ed] the sacrifice of a minimum decent (socially determined) standard of life for workers and peasants" as a purportedly necessary step towards a vaguely defined future prosperity (Green, 1978, p. 7).

While clearly drawing on the theoretical foundation provided by Rowntree and Booth, as well as the "entitlements" approach proposed by Amartya Sen (1981), the specifics of what constituted universal basic needs of the poor would become hotly debated (Green, 1978; Streeten, 1984). The demand of aligning universal rights and principles with the myriad of variation and diversity of needs present among African, Asian and Latin American developing countries prompted a significant intellectual blooming and period of critical self-reflection. Researchers began to work on questions around urban versus rural development (Lipton, 1977) and advocates encouraged reflections on the role of gender and other forms of social stratification in the expression of poverty (Rakowski & Saulniers, 1977; Whitehead, 1979).

This willingness to engage with the inherent complexity of poverty was overshadowed by the neoliberal turn in development thinking and practice. While structuralists in the tradition of Chenery responded to the challenge and modified their approaches, the 1970s saw the retreat of Keynesian ideas, the revival of neoclassical theory, and the rise of neoliberal ideas in policy circles. These transformations in academic and applied economics influenced development theory as well, albeit after a delay. The neoclassical critique emerged strongly in the 1980s. That decade saw the publication of Lal's (1983) deeply critical book, *The Poverty of "Development Economics"*, which argued that economic principles are universal, so the price mechanism should work for developing as well as developed countries. It also saw the ascendance of the "Washington Consensus" (Williamson, 2009) between Washington, D.C.–based institutions such as the World Bank and the International Monetary Fund over the need for stabilization, liberalization and privatization (United Nations, 2017). More broadly, development thinking in this period emphasized universal, ahistorical, economic "performance" over grand national development strategy (Gore, 2000).

Structural adjustment – essentially the liberalization, deregulation and privatization of national services and utilities in the name of development – became the near-universal global policy mechanism applied to addressing poverty concerns (Babb, 2005). Following the ancient pattern we have seen before, this produced a second wave of growth optimism in the 20th century. Through market and institutional liberalization, growth would be promoted as the most promising means towards any number of ends, including poverty reduction (Gore, 2000). Also following the typical pattern, aside from a small number of exceptions, the outcome of this theoretical experiment would prove disastrous for the poor. By the end of the 1980s, the empirical evidence of failure of the neoliberal Washington Consensus became undeniable (Öniș & Șenses, 2005).

While critiques had been drawing attention to the limitations of the neoliberal development policies for many years, the year 1990 really marked the mainstreaming of alternative approaches to how poverty would be positioned within development thinking. The World Bank's *World Development Report 1990* specifically focused on poverty and formally acknowledged the necessity for investing in social policies alongside economic reform. For the first time, the report introduced the "$1 a day" absolute measure of deprivation and estimated that 1.1 billion people were living in extreme poverty globally.

Furthermore, the UN Development Programme (UNDP) published the first *Human Development Report 1990*, which promoted the idea of human development as a separate concept from economic growth. As Hulme (2013, p. 12) argued, the report

> *facilitated the promotion of a broader understanding of what poverty reduction was about than previous measurements of income and consumption poverty had, and made this alternative more accessible to a wider group of professionals and the media. It gave left-of-centre scholars and social activists a relatively coherent framework from which to argue for policy change.*

Building on his earlier work, Sen also published his essay "Development as capability expansion" (Sen, 1990b) in 1990. Here he argued for a reframing of standard economic models for thinking about poverty, inequality and human development towards the provision of freedoms that enabled individuals to achieve their desired "beings or doings", or as Sen describes them, individual's "functionings". With further contributions from the political philosopher Martha Nussbaum and economists Sudhir Anand and James Foster, this body of work would later be formalized in Sen's magnum opus *Development as Freedom* (Sen, 1999). By articulating the need to include non-economic factors in a measurement of individuals' well-being, Sen's capability approach provided much of the intellectual underpinning to the transition over the next decade of poverty from a unidimensional to a multidimensional conceptualization.

The shift to multidimensional poverty

Throughout the 1990s a series of global summits were convened that led to the formal adoption of poverty eradication as a principal goal of development at the UN World Summit on Social Development held in Copenhagen in 1995. Significantly, by this point, commitments were being made to deliver "human" rather than "national" development, and in so doing, nations were now implicitly viewing poverty as a multidimensional problem. Arguably, this focus on the individual is an inheritance of the neoliberal shift in development thinking (Gore, 2000, p. 796). After Copenhagen, the tackling of poverty became fully mainstreamed in the policy and programming documentation and media communications of most international agencies, including the UN, World Bank, International Monetary Fund (IMF), the international Group of 7 (G7), the Organisation for Economic Co-operation and Development (OECD) and the African Union.

BOX 1: CENTRAL DISTINCTIONS IN POVERTY RESEARCH

Poverty is a complex concept, and different definitions and frames coexist. Here we briefly summarize some of the key concepts, presented as contrasting pairs.

Objective vs. subjective

Objective poverty assessments make normative judgements about what constitutes being poor and non-poor based on the purpose of the survey analysis. Such approaches are usually rigorously conceptualized and specified and allow for comparison over time. Advocates sometimes argue that individuals do not always make normatively appropriate choices, e.g. with regard to food expenditure.

Subjective poverty assessments ask surveyed individuals about their own and others' status within a given community or setting. This approach has the advantage of using judgements by those who know the most about their own lives and communities to establish how poverty is defined and measured, and it incorporates locally relevant normative judgements. However, it makes cross-comparison difficult.

Absolute vs. relative

Absolute poverty refers to subsistence below minimum, socially acceptable living conditions, usually established based on nutritional requirements or other essential goods. Relative poverty ignores absolute levels of income and instead compares relative location within an income, expenditure or wealth distribution. Poverty estimates based on these measures can move in opposite directions. For example, rising average income, combined with widening inequality, might lower absolute income while raising relative income.

Chronic vs. transient

Chronic and transient poverty refer to a consumer unit (e.g. household or individual). Regardless of the poverty definition, a consumer unit experiencing chronic poverty would almost always be classified as “poor”, while a consumer unit experiencing transient poverty would periodically or episodically be classified as “poor”.

Conjunctural vs. structural

Conjunctural and structural poverty refer to a society. In a society experiencing conjunctural poverty, a significant proportion of consumer units experiences transient poverty. In a society experiencing structural poverty, a significant proportion of consumer units experiences chronic poverty, often tied to inherited status or characteristics.

Assets vs. income vs. expenditure

When analysing the causes of chronic and transient poverty, a household’s assets give different information than its income or expenditure patterns. A household with no assets can meet its needs only from its current income. Its poverty will be transient if its income is normally high, and chronic otherwise. Since most households do have some assets, this gives a misleading picture. Consumption expenditure is typically less volatile than income because households use their assets to smooth their consumption. However, households can spend beyond their means (sometimes out of necessity, e.g. if local building codes make housing unaffordable). For this reason, asset measures are better predictors of a household’s ability to maintain lifestyles and livelihoods in the face of adverse shocks. However, data are scarce.

As we argued earlier, the possibility that poverty might be eradicated (at least in its absolute, objective forms; see Box 1) allowed a shift from narrow legal definitions of poverty to broader functional definitions. In recent decades, the policy focus on poverty, particularly by the World Bank, has driven the collection of data on household income, expenditure and assets. Yet at the same time, researchers and critical theorists have argued for a need to move away from the quantification of poverty and move towards interrogation of what poverty means to those who are experiencing it.

From observation to understanding

An influential conceptual innovation introduced in the early 2000s was the development of the Sustainable Livelihoods Framework (SLF), built on the cumulative experience of researchers at the Institute for Development Studies (Leach et al., 1997, 1999). The framework presented a complex picture of communities and households, in which households develop strategies to meet livelihood goals using their available “capitals” – human, financial, physical, natural and social – in their institutional context. By extension, they could experience deprivation on any number of these dimensions.

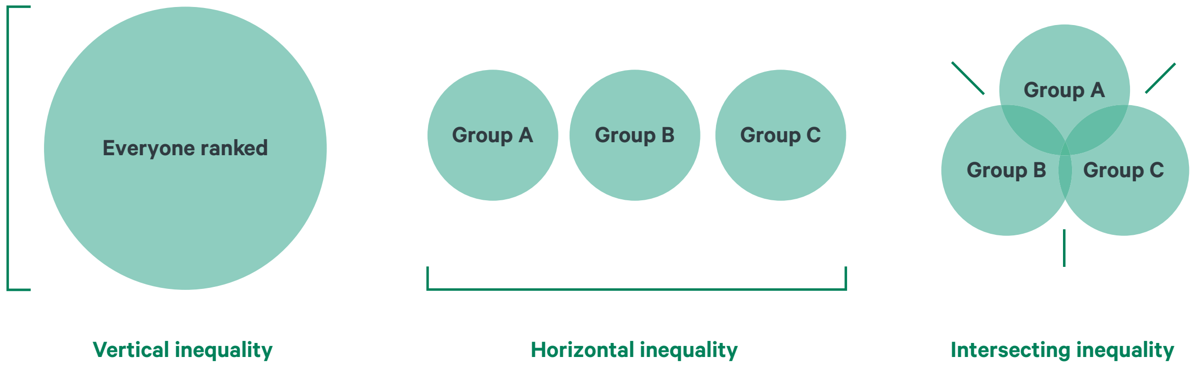
The SLF supported a process of redirecting attention towards the heterogeneity of individuals and groups who were identified as vulnerable or "poor" and how such realities are experienced unequally in particular contexts. This refocusing brought into attention a revision in poverty analysis that focused more on the evaluation of inter- and intra-group inequalities – a relative comparison that was a revolutionary perspective at its introduction.

While inequality is a wider concept than poverty, the concept of *vertical inequality* mirrors much of the discourse on poverty, in that it evaluates inequality by first ranking all individuals or households by a given characteristic (i.e. income) and then calculating the degree of variation present across the sample. This is essentially the same Gini coefficient approach that is used by many quantitative evaluations of multidimensional poverty.

Horizontal inequality, on the other hand, looks at groups of individuals according to a selected collective characteristic (i.e. ethnicity, race, etc.) and then evaluates inequality by determining the relative observed differences between these groups. Poverty analysis of horizontal inequality can be as simple as comparing relative amounts between these two groups, such as urban and rural incomes, but it has also been used to explore how different policy actions can impact different groups (Brown & Stewart, 2006).

Intersecting inequality is used to understand poverty impacts on groups of individuals whose characteristics overlap, such as in the case of low-income earners from a socially marginalized ethnic or gender identity. The study of intersectionality, introduced by Crenshaw (1991), demonstrated the "simultaneous and interlocking" deprivations that characterize individuals' and groups' experiences and, crucially, how these can compound over time to create endemic poverty (Bird, 2019).

Figure 2. Vertical, horizontal and intersecting approaches to inequality analysis.



Source: Lenhardt & Samman (2015)

The advent of intersectional thinking (Figure 2) encouraged a growing interest among scholars and practitioners working directly with poverty impacts to better understand the lived experience of poverty. The field has moved away, therefore, from an expert-oriented understanding of "poverty thinking" toward a phenomenological study of poverty that emphasizes the importance of non-experts' opinions about their own lives (Simpson Reeves et al., 2020). This approach required that poverty not be defined externally but rather explained from within the perspective of those who experience it; they are considered as agents and "experts" on how they manage the constraints imposed on them. Such an approach can be used to analyse the impacts of poverty on mind, body and social relations – and vice-versa (Bray et al., 2019; Simpson Reeves et al., 2020; van der Merwe, 2006).

This reframing of knowledge within the poverty discourse and the acknowledgement of the effect of intersectionality on long-term poverty has been particularly effective in allowing space for contributions from previously socially, politically and economically marginalized perspectives. For example, Yarbrough's work addressed the experiences of poverty of transgender people and sought to deepen how social exclusion, unequal power relationships, and deprivations operate in their contexts (Yarbrough, 2021). In another approach, Bray et al. (2019) provided a conceptual framework, developed as a result of participatory poverty research that seeks to incorporate an understanding of intersectionality. The framework also introduced "experienced metrics" of poverty that recognize the disempowering effect of poverty on individual and group agency in the *hidden dimensions of poverty* (Bray et al., 2019; Godinot, 2021; OPHI, n.d.).

Conclusion

Poverty remains a poorly defined concept, despite the work and thinking that has unfolded to address it. In the second half of the 20th century, concepts of poverty coevolved with the concept of development, with an initial focus on poverty at a country or macro level. More recently, "poverty thinking" turned to looking at how the condition of poverty impacts different sectors within a country, focusing ultimately households and individuals. In the process, the definition has expanded to cover a diverse range of causes and manifestations of poverty, with the latest emphasis on moving beyond a distanced accounting of poverty and instead attempting to better understand the lived experience of poverty in its many dimensions.

Correspondingly, definitions have evolved to meet the needs of actors looking at and working on poverty issues, whether these be academics, civil society, government or international agencies. First, the primary interest focused on determining a legal right to aid; this progressively shifted over time to understanding where poverty eradication should be targeted; and most recently, attention has been given to interrogating the causes of poverty to improve poverty eradication strategies. While to some degree these interconnected perspectives have always been considered, as this historical review lays out, the broad trend of thinking and discourse has been to move from a distanced analysis of who should be considered poor, towards a greater interrogation of what poverty means to those who experience it and how this can be alleviated.

Since the 1950s, what development is and how it engages with ideas around poverty has undergone an associated theoretical journey, considering fundamental questions about what we value and how we organize our societies, and as such its meaning continues to evolve and be contested. In the words of Orshansky (1977, p. 244), "For deciding who is poor, prayers are more relevant than calculation because poverty, like beauty, lies in the eye of the beholder."

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