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Ethics of Reducing Inequality: Some Points

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ABSTRACT

Favoring people without valid reason leads to inequality which tends to arouse a judgment of injustice that makes it one of the foremost moral issues. One of the main problems that this paper examines is the object regarding which the question of inequality reduction comes to the fore to which different philosophers offer numerous replies. Some of these replies are related to treating goods and services equally, just income and resources, fair allocation of primary goods, equalization of utility, equality of opportunity, equality of capabilities, etc. Another problem of reducing inequality that is examined by this paper is the subject of equality. Inequalities are inflicted on the people based on their memberships to different genders, religions, races, classes, or regions. An important dimension of the problem of the subjects of equality is the moral bearing of the present people to ensure the equal living conditions of the people to come. In order to solve these problems apropos of the inequality reduction, it is suggested that economic endeavors should not be ignorant of ethics, that is, a connection between ethics and economics should be established. This connection would help understand the necessity of equality among citizens.

Keywords: Inequality reduction, equality, difference principle, philosophy of economics, development ethics.

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1.0 Introduction

Ethics is a branch of philosophy that deals with the voluntary actions of human beings living in a society. The normative evaluation of any inequality among them that is caused by the voluntary actions of human being should, therefore, be a subject-matter of ethics. The problem of inequality reduction can be considered as a problem of ethics in so far inequality is set off by the voluntary actions of humans

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because ethics as a branch of philosophy deals with those actions of us which are done willingly. Inequality is an obstacle in the process of development which encourages me to believe that reducing inequality is an important goal of any society. That is to say, virtually every society is affected by inequality the reduction of which becomes one of its prime goals. Achieving this goal cannot be done unless it is handled properly, and for proper handling, what is needed is not to take for granted that it is not a moral issue. Rather inequality reduction is a moral issue that development policy-makers need to take into consideration in implementing development programs. Any policy that is not impregnated with moral contents endangers programs of inequality reduction. An evidence of the failure of any amoral policy of reducing inequality is the rising incidence of world poverty and increasing inequalities between nations and within nation. Ethics can, therefore, play a role in reducing inequality by developing a sense of morality in man that would affect his or her behavior. The aim of this paper is to review the ethics of reducing inequality. For this purpose, I would like to discuss different basic questions related to inequality reduction in order to show various responses made by different philosophers and ethicists. Before this, an attempt will be made to clarify the concept of inequality reduction. This article will conclude showing that a link between ethics and economics should be established in order to reduce inequality.

2.0 Methodology

There is an extensive literature on the ideas of equality and inequality, of subjects and objects and equality/inequality. I shall collate and analyze this literature, distinguishing the various positions on offer, from the most economic to the most idealistic. In this context of literature review, collation and analysis, the present article has a decidedly theoretical dimension. As the idea is to elaborate this theoretical reflection, I shall identify major sites of contention on matters of subjects and objects and equality/inequality, and then develop a connection of economics and ethics keeping the discussion on the subjects and objects of equality as a background.

3.0 Reducing inequality as a moral issue

Reducing inequality is one of the most important basic issues that the ethics of development is concerned with. This concern becomes more significant for the relation between inequality and poverty: inequality makes poverty starker and harder to bear. As *World Development Report for 2000/2001: Attacking Poverty* postulates, “Other things being the same, growth leads to less poverty reduction in unequal societies than in egalitarian ones” (World Bank, 2001, p. 55). The relation will be clearer from the statement that “high-inequality countries will need to grow twice as fast as low-inequality countries to halve poverty by 2015” (Hanmer, Healey, & Naschod, 2000, July, p. 01). In fact, the measure of poverty reduction can be understood in reference to its effects on inequality reduction. Hence, it is pertinent here to mention Enos Chikowore (as cited in Gasper, 2007),

[T]he degree of inequality (which encompasses inequality between individuals or social groups and inequality between areas) is regarded as an important criterion for measuring development and the reduction of inequalities is considered to be one of the most important goals of development (p. 88).

Global inequality has two dimensions – the inequalities which exist between countries and the inequalities within countries. But these two dimensions are very closely related, i.e., one affects another as the widening gap between rich and poor countries accounts for much of the increase in worldwide income inequality among individuals and households. The widening gap between the developed and the developing countries is one of the most talking problems of today’s world.

Now, the question is: Why is there the problem of inequality? The problem of inequality arises because some people are treated more or less favorably than the others without an ostensibly valid reason, which arouses a judgment of injustice. If we consider economic inequality only, we will find many

reasons responsible for the problems like innate ability, education, growing technology, globalization, racism, gender, culture, wealth condensation, development patterns, and personal preference for work, leisure and risk. In general, these reasons are responsible for increased global inequalities – both between countries and within them. Our indifference toward this mounting predicament of inequality – both between countries and within countries – is mainly caused by our inadequate knowledge of the moral dimension of the inequality problem.

Equality issue is the obverse of the inequality issue. Though equality issue in world development can be discussed from the economic, financial, social, psychological and political standpoints, this is at bottom a moral issue (Myrdal, 1975, p. 02). So, to help see the ethical dimension of inequality problem clearly, let us ponder over some of the common queries. Questions can be asked: Why should we value equality? What is the ethics behind it?

What does reducing inequality mean? Does it mean that a seeing person should be caused to be blind as the blind could not be presented with sight? This is a leveling-down attempt which is not morally tenable because this is something like trimming rose bushes which would be perverse as well as immoral (Miller, 1982, p. 73). This would be such if no better and equally egalitarian alternatives were available. But in reality almost always there are such cases as those who can see should help the blind, e.g., by helping him cross the road or by any other acceptable means. However, this is an objection raised against the intrinsic value of equality, according to which, equality is good in itself, i.e., inequality in the distribution of something is bad in itself. Equality is instrumentally good because it helps realize some ideals, which are intrinsically good. In this case, equality is either a byproduct or a means (Scanlon, 2003, pp. 203-08). These ideals include universal freedom, full development of human capacities and human personality, the mitigation of suffering and defeat of domination and stigmatization, the stable coherence of modern, freely constituted societies, and so forth (Gosepath, 2011, para. 59). It is also suggested that concern of sufficiency should take the place of the concern for equality. As it is pointed out,

[W]hat is important from the moral point of view is not that everyone should have *the same* but that each should have *enough*. If everyone had enough, it would be of no moral consequence whether some had more than others" (Frankfurt, 1998, pp. 134-5).

4.0 Objects of Equality

The query with which now we are going to deal with is: What should be equalized? That is, what are the objects of equality? There is a great disagreement with regard to in which particular respect people should be treated equally.

With wide prevalence of egalitarianism, the notion - everyone is furnished with the same material levels of goods and services – is usually abandoned as flawed. This type of strict equality was not supported by any important author or movement, save G. Babeuf and Marechal (1997). Even the communists or socialists (e.g., Marx, 1989) did not call for absolute economic equality though they protested against poverty and exploitation. When economists discuss about equality and inequality, they have income and resources in mind. It is the simplest equality. But there arises many problems that involve questions like desert, choice, luck and incentives. As it is pointed out,

All of these problems could be dealt with by redefining resources in a way which takes into account all possible handicaps, problems, and heterogeneities but it is not clear which differences to compensate for and why, and whether one can actually do that without equalizing incomes which, of course, raises questions involving desert, choice, luck, and incentives (Dutt & Wilber, 2010, p. 195).

Libertarianism and economic liberalism entail an original right to freedom and property maintaining Lockean stream. Thus they (e.g., Hayek, 1978; Nozick, 1999) argue against redistribution and social rights but for the free market. According to them, the relation between equality and freedom is antagonistic. Freedom can never be limited with the possible exception of foreign and domestic peace. That's why libertarians maintain public order as the state's only legitimate duty. Will Kymlicka (2002) objects against libertarian approach of equality by saying that its interpretation of Lockean proviso – one's situation should not be worsened through a primary possession of property – leads to an excessively weak requirement and is thus unacceptable (pp. 107-127). Economic liberals like John Rawls put more emphasis on social and economic equality. For that, Rawls advocates certain basic goods which are needed to be equipped to guarantee the equitable or fair value of the basic liberties (Rawls, 2005, pp. 178-90). But this liberalist approach of equality of Rawls is not acceptable as it makes some relatively small efforts to improve the lot of the worst-off whereas by favoring the best-off it widens the gap between the two (Dutt & Wilber, 2010, p. 192).

The approach which says of the equalization of utility or welfare is also problematic for many reasons. One of those is presented by Dutt & Wilber (2010, p. 196),

[[If we compare a rich person and a poor person in terms of resources, if the rich person is unhappy because he or she wants even more (or at least says so), while the poor person is satisfied with his or her lot, should we give more resources to the former and less to the latter?

According to many egalitarians (e.g., Temkin, 1993; Cohen, 1989), moral significance of choice and responsibility is one of the most important values vis-à-vis equality. This principle of responsibility holds that inequalities that are not the consequence of self-chosen options are unjust. Hence, if a person has this kind of disadvantage, there should be reparation. Argument of this type leads us to the demand of fair equality of opportunity. As Stefan Gosepath (2011) says:

Approaches based on equality of opportunity can be read as revisions of both welfarism and resourcism. Ranged against welfarism and designed to avoid its pitfalls, they incorporate the powerful ideas of choice and responsibility into various, improved forms of egalitarianism. Such approaches are meant to equalize outcomes, insofar as they are the consequences of causes beyond a person's control (i.e., beyond circumstances or endowment), but to allow differential outcomes in so far as they result from autonomous choice or ambition. But the approaches are also aimed at maintaining the insight that individual preferences have to count, as the sole basis for a necessary linkage back to the individual perspective: otherwise, there is an overlooking of the person's value (para. 49).

Peter Singer (2011) reads this equality of opportunity approach beautifully as follows:

In our society, large differences in income and social status are commonly thought to be all right, as long as they were brought into being under conditions of equal opportunity. The idea is that there is no injustice in Jill earning \$300,000 and Jack earning \$30,000, as long as Jack had his chance to be where Jill is today. Suppose that the difference in income is due to the fact that Jill is a doctor whereas Jack is a farm worker. This would be acceptable if Jack had the same opportunity as Jill to be a doctor, and this is taken to mean that Jack was not kept out of medical school because of his race or religion or a disability that was irrelevant to how good a doctor he would be – in effect, if Jack's exam results had been as good as Jill's, or he had satisfied other criteria relevant to being able to practice medicine as well as Jill had, he would have been able to study medicine, become a doctor and earn \$300,000 a year. Life, on this view, is a kind of race in which it is fitting that the winners should get the prizes, so long as all get an equal start. The equal start represents equality of opportunity and this, some say, is as far as equality should go (p. 34).

Peter Singer (2011) also rejects this approach because of the following:

[E]quality of opportunity is not an attractive ideal. It rewards the lucky, who inherit those abilities that allow them to pursue interesting and lucrative career. It penalizes the unlucky, whose genes make it very hard for them to achieve similar success (p. 35).

There is another approach of equality, mainly developed by Amartya Sen, that evaluates and assesses individual well-being and social arrangements and the design of policies and proposals about social change in society in terms of a person's capabilities, that is, the set of things that a person is effectively able to do and to be. The capabilities approach considers income inequality and poverty as "capability deprivation" (Sen, 2001, p. 86). Hence, this approach insists on equality with regard to such capabilities (the freedom to enjoy functionings) which essentially represent the individual's opportunities to achieve valuable functionings (the things a person values doing). This approach shifts attention from goods to capabilities. This shifting caused by the capabilities approach explicitly makes interpersonal comparisons of people's capabilities to convert primary goods² into the metric of good whereas the concept of equality fails in this regard (Naqvi, 2002, p. 152). Making such interpersonal comparisons is vital because without them "we cannot even understand the force of public concern about poverty, hunger, inequality, or tyranny" (Sen, 1999, p. 365). But this approach too is not free from flaws. One of these flaws is mentioned by Dutt & Wilber (2010, p. 196):

Problems arise ... with being able to distinguish between capabilities and the ability to make use of these capabilities. What if schooling is available to everyone, but children in some families are unable to acquire education properly, for instance, because of the lack of parental support for it?

5.0 Subjects of Equality

The next problem regarding reducing inequality issue that I am going to discuss is: Equality among whom and within what? That is, who are the subjects of equality? Income, expenditures, wealth, land holdings, etc. are common standards in terms of which inequality of different groups is commonly measured. This is vertical inequality. In this regard, Julius Nyerere, as cited in Gasper (2007) reviews:

There are three aspects to the development of greater equality within a nation. One is differentials in personal incomes. The second is different degrees of access to public services, and the extent to which taxation-supported activities serve the interests of the people as a whole rather than those of a small minority. And the third is participation in decision-making (p. 89).

But there is another measure of inequality, viz., horizontal inequality. It refers to a kind of inequality of income or some other valued things which is mainly a result of discrimination based on gender, religion, race, class, or region though the people belonging to these groups are of similar origin, intelligence, etc. Horizontal inequality can be explained by causes which are different from those of vertical inequality. It can also be reduced by different kinds of public policies. To reduce horizontal inequality, methods like affirmative action or reverse discrimination in hiring and distribution of resources, proportional representation in government or seat reservations in legislative bodies may be called for. In this regard, horizontal inequality is different from vertical inequality. The following is an example of reverse discrimination which is formulated by John Rawls (1999a):

Social and economic inequalities are to be arranged so that they are both (a) to the greatest expected benefit of the least advantaged and (b) attached to offices and positions open to all under conditions of fair equality of opportunity (p. 72).

² Rawlsian primary goods that include rights, liberties and opportunities, income and wealth, and social bases of self-respect.

This principle is known as the principle of social justice of which the first part is called the difference principle which justifies inequalities of any (or all) of social primary good(s) – liberty and opportunity, income and wealth, and the social bases of self-respect – only when these uneven portions of goods are to the benefit of the so-far discriminated (Rawls, 1999a, p. 54).

However, the question which interests the philosophers is that whether inequality among different racial and ethnic groups (inequality of the horizontal kind) should be considered morally objectionable in itself, or fundamental point of interest should be how individuals as members of such groups progress in comparative terms (Gosepath 2011, para. 52). Stefan Gosepath (2011, para. 52) answers it by asking “If we are worried about inequalities among groups of individuals why does this worry not translate into a worry about inequalities among members of the group?” Though the intention of Gosepath is clear here, he, I think, in his answering-by-asking style, commits a fallacy of division³ by taking for granted the assumption that what worry of inequalities is true for a group of individuals is also true for each member of the group.

There is another dimension of inequality based on the unit or domain in which it is measured. In dealing with the current problem, so far we have focused on a country. But other units are important too. Some of these units are inequalities within a family, within an urban area, or at the world level. Hence, the following questions are mentioned by Gosepath (2011, para. 53): Are the norms of distributive equality (whatever they are) applicable to all individuals, irrespective of where and when they live? Or, are they only applicable to members of communities within states and nations?

Inequality at the world level is important in this increasingly interconnected world for array of reasons. It may refer to individual-level inequality or country-level inequality. Turning to international inequality, we face many ethical dilemmas. Consider the following case,

Suppose at a point in time there are two countries, one rich and one poor. The rich country has high tariffs against the importation of textiles and employs many low-wage workers in the industry. The poor country is starting a textile industry in hopes of employing its large unskilled work force. Because of its poverty the main market for its products must be exporting to the rich country but the high tariffs prevent this from happening. The poor country appeals to an international “ethics board” that these tariff walls are an unfair trade practice. The rich country argues that it must protect its poor workers. The poor country argues that the rich country can afford to retrain those workers and move them to other industries while it, the poor country, has no alternative but to export (Dutt and Wilber, 2010, p. 213).

Cases of this type demonstrate ethical complexities of international trade policy. One of these complexities is: Do rich countries bear any moral responsibility to provide assistance to poor countries in order to reduce inequality between countries? Various arguments are given in favor of foreign aid. One of these arguments is consistent with Nozick’s view which is based on some historical wrongs, e.g., due to colonization and plunder (Nozick, 1999, pp. 149-53). Rawls’s difference principle can also be used as a moral justification of foreign assistance, although Rawls (1999b) “explicitly rejects its application to global justice with the argument that the moral agents of international justice are not individual human beings within a society, but peoples” (Dutt & Wilber 2010, p. 215). This version of distributive justice of John Rawls is called domestic distributive justice.⁴

There is another complex moral issue regarding relations among generations: Does the present generation have any moral responsibility towards the future generations concerning equal living

³ According to Copi, Cohen and McMahon (2014), the fallacy of division is a fallacy of ambiguity in which “an argument erroneously assigns attributes to parts of a whole (or to members of a collection) based on the fact that the whole (or the collection) has those attributes” (p. 150).

⁴ To nullify Rawls’ claim of limiting his principles of distributive justice (especially, difference principle) to the domestic level, I have presented my own arguments in Huda (2012a).

conditions? That is, do we have any egalitarian obligation to future generations? The world is not only for the present generation. Future generations have also rights to the world. Hence, sustainable development⁵ necessitates the extension of ethical concern to future generations as well. It suggests present day people to consider the well-being of future generations, and to balance the needs of current and future generations. It considers their needs as morally worthy as that of the current generation. In fact, besides balancing economic, environmental, and social objectives, the concern for yet-to-be-born-people is one of the basic tenets of sustainable development. So, limited non-renewable natural resources (for example, minerals, gems, water, forests, wildlife, etc.) – that the present people use faster than the planet can restock – should also be used in the way that compromises the ability of future generations to meet their needs.

6.0 Conclusion

Treating inequality problem merely as an economic problem and waiting for its solution from economics are tantamount to risking ourselves. This is partly because the dimension of inequality issue is not involved with a single discipline, i.e., economics. It also involves development studies, political science, and public administration. In addition, it raises basic questions of value. So, dealing inequality issue with the hope of finding a technical quick fix leads only to a narrow understanding of what is in jeopardy because relying on economics without considering the ethical and philosophical issues can raise as many problems as it solves.

The danger in overreliance on economics for reducing inequality is something that goes beyond the simple point of technical complexity. Economics is not as value neutral as many assume. So, reliance on well-informed economics can be risky if the information fails to give us a complete picture of the story. Before relying on answers by economics to reduce inequality problem, we need to know what questions the economists are asking, and the questions they ask are often determined by factors that locate outside the sphere of economics.⁶

For example, if we define inequality problem as a problem of material levels of goods and services, we can easily conclude that we need to equalize our material levels of goods and services. Economics can document the facts of inequality and suggest imposing more taxes on the rich. Again, if we define inequality problem as a problem of original right to freedom and property, we will come up with different answers. If inequality problem is defined in this way, economists can suggest implementing any system of compensation as Rawls's difference principle after failing to ensure fair system. Thus, we have a situation in which two sets of understandings of the problem of inequality leads to quite different policy recommendations. One set supports imposing more taxes on the rich whereas the other set favors compensatory measure. To get rid of this sort of dilemma, the economic facts and information barely tell us with confidence anything about which alternative we ought to choose.

Here, we should be intellectually honest by not deceiving ourselves into thinking that economics demands that all its uses are value neutral, and that because any economic problem like inequality reduction involves technical issues, it does not raise ethical questions as well. Philosophy of economics and development ethics can play their role here by exposing the hidden value assumptions of alternative economic and development policies. Sometimes this will require examining the value assumptions implicit in economics and development studies. One of these examinations can help figure out the answers to the fundamental questions about what should be equalized, who are the subjects of equality, etc.

⁵ According to *World Commission on Environment and Development (1987)*, "Sustainable development is development that meets the needs of the present without compromising the ability of future generations to meet their own needs" (p. 43).

⁶ Here, it is pertinent to mention Amory Lovins (as cited in *Jardins, 2001*) who says that "answers you get depend on the questions you ask" (p. 09).

However, it would also be erroneous to think that some abstract ethico-philosophical theories ignorant of economics, development studies, and other relevant disciplines can reduce inequality problem. Philosophical ethics cannot be the alternative to economics for reducing inequality. The only serious alternative is to recognize that both economics and ethics are essential if we hope to make meaningful progress in meeting the economic challenges that confront us while trying to reduce inequality. We can sum up the whole perspective by revising an old philosophical saying: “Economics without ethics is blind; ethics without economics is empty.”

From the discussion so far, it is seen that in dealing with the issue of reducing inequality several problems arise – for example, what is the ethics behind equality? What should be equalized? Equality among whom and within what? – which, I think, cannot be solved from a value-free or ethically neutral way as it has been being tried. Rather they can be better solved if we resort to moral values with reference to their social and economic consequences. Hence, to solve the problems, marriage between ethics and economics and development theories is necessary. It would, therefore, be relevant here to mention an excerpt from **Syed Nawab Haider Naqvi (1993)** which he has said with the purpose of showing the necessity of conjoining ethics and economics:

I have been arguing that the ethical values of a society can be fruitfully integrated into the corpus of development theory and practice and that our ethico-moral values should be carefully chosen with reference to their social and economic consequences. To recapitulate, the point of departure of our inquiry is that the search for value-free or ethically neutral decision rules is both pointless and counter-productive. It is pointless because no such thing is possible (p 124).

The necessity of ethics regarding the issue of inequality reduction is not limited to a simple-cut moral analysis of these problems of inequality. Rather we see a great debate among different philosophers on the issue. Thus we find an improved literature of development ethics⁷ that is fraught with academic fight among the recent philosophers like **Rawls (1999a; 1999b; 2005)**, **Nozick (1999)**, **Sen (1999; 2001; 2004)**, **Dworkin (1977; 2000)**. All of them, I think, are affected by the fact that ethical considerations influence our everyday lives. Hence, it will not be wise to claim that inequality problem can be reduced by value-free economics only; ethics does matter too.

The ethics of development suggests the way how important development problems are to be analyzed more successfully. Hence, through the marriage between ethics and economics⁸, the problem of inequality and of assigning appropriate roles to the market and the government may be dealt with in a rational way. The ethics of development helps realize it well that the painful process of economic development cannot be maintained without ensuring a modicum of equality among the citizens. This realization is now in work in maximizing citizens' welfare, where what else is maximized is immaterial.

⁷ Development ethics “studies the ends and means of local, national and global development. It is concerned with the justification of development on the basis of normative issues, like the meaning of good life, social justice and the human attitude towards nature. Deploying the knowledge that it collects from various areas like economics, political sciences, anthropology, environmental science and others, development ethics attempts to resolve various problems related to development” (Huda, 2012b, p. 36).

⁸ **Amartya Sen (2004)** says that “the distancing of economics from ethics has impoverished welfare economics, and also weakened the basis of a good deal of descriptive and predictive economics” (p. 78).

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