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РАЗНООБРАЗИЕ ОПРЕДЕЛЕНИЙ ПОНЯТИЯ БЕДНОСТИ И КЛАСТЕРЫ БЕДНОСТИ

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Сегодня растет потребность в накоплении и обобщении знаний, связанных с вопросами изучения бедности. Это должно способствовать разработке новых подходов к борьбе с бедностью, без чего любая попытка изучить эту сложную и многогранную проблему обречена на неудачу. Дальнейшее развитие общей теории бедности посредством обобщения накопленных знаний, относящихся к пониманию сущности бедности и ее типов является целью настоящего исследования, теоретико-методологическими основаниями которого выступают анализ, сравнение, систематизация и классификация различных взглядов на бедность, разработанных в научной литературе по экономике, социологии, антропологии, психологии и политическим наукам. Изучены различные взгляды на сущность бедности. Выделены семь критериев определения бедности: денежное (монетарное) понимание сущности бедности, понимание бедности на основе дисбаланса соотношения количества ресурсов и численности населения, классовое понимание бедности, понимание бедности, основанное на стандартах жизни, определение бедности на основе самоидентификации, определение бедности на основе образа жизни, понимание бедности, основанное на человеческих возможностях. Выявлены, сопоставлены и объяснены 34 различных наименования 27 типов бедности, которые подразделены на 8 кластеров бедности: кластер основных типов бедности, кластер оценки бедности, кластер

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происхождения бедности, кластер проявления бедности, кластер характера бедности, кластер устойчивости бедности, кластер распределения бедности, кластер исключения. Практическое значение исследования состоит в систематизации определений бедности и его кластерном анализе, которые направлены на лучшее понимание феномена бедности, что может способствовать разработке новых подходов к борьбе с проблемой и быть полезным для поиска эффективных способов ее преодоления. Оригинальность и ценность исследования заключаются в представлении результатов всестороннего и комплексного анализа существующих объяснений и определений сущности бедности и ее типов, а также в предложении авторского видения их систематизации и классификации.

Ключевые слова: определения бедности; типы бедности; кластеры бедности.

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POVERTY DEFINITIONS DIVERSITY AND CLUSTERS OF POVERTY

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Today is a growing need to accumulate and generalise knowledge related to poverty which should facilitate the development of new approaches toward fighting poverty. Otherwise, any attempt to study this complex and multi-faceted problem is doomed to be incomplete. The main purpose of the paper is a further development of the overall theory of poverty through the generalisation of accumulated knowledge, related to poverty essence and poverty types understanding. The theoretical and methodological foundations of the paper are based on the analysis, comparison, systematisation and classification of the different views on the poverty, developed in scientist literature on economics, sociology, political sciences, anthropology, and psychology. Proceeding from the analysis of the different views on the poverty essence the article has been systematised and grouped poverty definitions according to seven different criteria, particularly: monetary-based understanding of poverty, population-resources-ratio-disbalance-based understanding of poverty, class-based understanding of poverty, living-standards-based understanding of poverty, self-identification-based determinations of poverty, life-style-based determinations of poverty, human-capabilities-based understanding of poverty. The analysis of the scientific literature has allowed to find out, compare and explain 34 different titles of 27 types of poverty, that are classified in 8 clusters of poverty: cluster of basic types of poverty, poverty assessment cluster, poverty origins cluster, poverty manifestation cluster, cluster of the poverty nature, poverty sustainability cluster, poverty distribution cluster, cluster of exclusion. Systematisation of poverty definitions and poverty cluster analyse are directed on a better understanding of the poverty phenomenon that might facilitate the development of new approaches toward fighting poverty and be useful for the find out effective ways of its overcoming. The study presents the results of comprehensive and complex analysis of the existing explanation and definitions of poverty essence and poverty types and offers authors' views on their systematisation and classification.

Keywords: poverty definitions; poverty types; poverty clusters.

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Introduction

The socio-economic inequality has always been and continues to be a problem that to a greater or a lesser extent is immanent for all countries and thus has a global character. Despite the adoption and enactment of many programs aimed to combat poverty and making certain positive results, the problem of poverty remains insurmountable and the gap between the richest and the poorest countries and peoples is further enhanced.

The investigation of poverty has a long living history. Income inequality, social stratification, and an arrangement of the community were considered by Plato, Aristotle, Confucius, N. Machiavelli, T. Hobbes, and others. Despite that, the concept of poverty still has no clear scientific explanation and the endless debates about the essence of poverty and its explanation in an academic community continue till now. One of the difficulties in a poverty investigation is the too wide diver-



sity of the definitions of this phenomenon. Poverty is often associated with political processes or considered as a purely economic or anthropological phenomenon.

To make a comprehensive understanding of the poverty issues is important not only in terms of satisfying scientific interest. The pervasive investigation of poverty issue is important, first of all, in its practical significance due to the necessity to developing a policy aimed the overcoming this phenomenon. The lack of a clear understanding of the poverty issue and the existence

of the diversity of poverty types largely determines the difficulty of achieving some significant results in the fight against it.

In other words, without an in-depth study of all forms and types of poverty, the achievement of poverty understanding and finding the ways of its overcoming seems to be greatly complicated.

The aim of this study is to identify, analyse, group, and characterise the types and definitions of poverty essence based on the study of scientific literature.

Literature review: current state of the problem study

The social-economic stratification of society and consideration of poverty as a real-world phenomenon began even in ancient times and was considered by Plato, Aristotle, Confucius, N. Machiavelli, T. Hobbes, and others. Certain aspects of poverty were studied by A. Smith, D. Ricardo, T. R. Malthus, P.-J. Proudhon, J. S. Mill, K. Marx, F. Engels, etc. But during a long time, poverty was usually examined in the wealth being context, and only in the late 19th century a direct investigation of the poverty problem started in England and was associated with Charles Booth (1840–1916), and Benjamin Seeböhm Rowntree (1871–1954).

Today the problem of poverty is studied by different field of social sciences.

Political science distinguishes various ideologies of political powers like conservatives and liberals that give different answers to the question: who is responsible for the social-economic inequality and poverty. The liberals rest the charge for the poverty on the society, while the conservatives – on the poor people themselves [1; 2, p. 5–19]. The theory of justice [3; 4; 5], developed within the political theory of poverty, considers different poverty-related concepts such as politics of distribution, the politics of recognition, the politics of affirmation, and politics of transformation [3; 4, p. 424; 5, p. 75].

Psychological science is based on S. Freud's [6] belief that the ego is a part of the human psyche that perceives reality or the external world as a pressure of inner and outer conflicts. The psychological theory of poverty considers behaviour of the poor based on the attribution theory [7] that recognises two styles of attributions: internal or dispositional attribution that explains humans' behaviour through their personal characteristics and abilities, and external attribution or situational attribution that is based on the situational explanation of human behaviour.

The anthropologists develop various approaches to poverty investigation that are based on the inter-comparison of different cultures and on the analysis of the peculiarities of poverty. The *emic approach* or the view from inside directly integrates poor into a socio-cultural environment while the *etic approach*, i. e. the view from outside suggests objectivity of opinions when poverty is evaluated by people outside of a socio-cultural envi-

ronment and therefore assumes the objectivity, neutrality, and universality of their opinions [8].

Sociology introduces poverty as a person's lifestyle position and a system of adopted values, as a social good and a basis for the instinct of self-preservation [9; 10], while the representatives of the egalitarian approach consider poverty as a social evil. The (sub)cultural theory of poverty, developed in sociology, closely connects the culture of poverty with the idea of the «vicious circle of poverty» [11].

In the economic sciences, the theory of poverty is based on a material approach, i. e. on the possibility to satisfy the material needs of human beings. Different economic schools use different approaches toward poverty investigation and develop various views on this problem. The representatives of classical and neoclassical economic schools [12–16] mostly investigated the problem of welfare achievement and discussed poverty as a hindering factor to furtherance this goal. In this case, the views, developed by J. Proudhon [17] could be considered as an exception because he estimated poverty as a result of conflict between limitless human consumption and limited opportunities for production. Another exception is K. Marx's understanding of poverty who considers poverty as a result of class exploitation [18]. For R. T. Malthus poverty was associated with a disproportion between redundant population and lack of resources [14] and institutionalist J. Commons [19] partly agreed with Malthus although he claimed that it is not obligatory that the poor strata of society are living in a parasitic manner. The representative of neoliberal school F. Hayek [20] believes poverty can be overcome only through achievement of common prosperity while for M. Friedman overcoming poverty is possible through charitable activities [21].

Among the modern prominent researchers of poverty should be noted A. Sen [22], D. J. Sachs [23], P. Townsend [24], E. S. Reinert [25], J. Stiglitz [26], T. Shildrick and J. Rucell [27], etc. Different authors consider various aspects of poverty and social-economic inequality [28–30].

Despite the considerable significance of the research and results obtained by the above-mentioned authors, the alleviation of poverty-related problems still requires attention and development of theoretical-methodological approaches toward the study of this complicated and ambiguous socio-economic issue.



Methodology

The study is based on the analysis, comparison, systematisation and classification of the poverty essence definitions and poverty types-related scientific views,

developed by scholars from different field of social sciences such as economics, sociology, political sciences, anthropology, and psychology.

The variety of the definitions of poverty essence

There is an abundance of poverty essence understanding in the scientific literature. Based on the analysis and systematisation of these determinations, it is possible to group the definition of poverty according to the following criteria:

1) *monetary-based understanding of poverty* that is based on the poverty explanation by low income that cannot meet elementary physiological needs (P.-J. Proudhon, K. Marx, J. Sachs, E. S. Reinert, J. Stiglitz, World Bank, etc.) [17; 18; 23; 25; 26; 31];

2) *population-resources-ratio-disbalance-based understanding of poverty* that determinates poverty as the result of the disproportion between the number of resources and number population (P. J. Proudhon, R. T. Malthus, etc.) [14; 17; 31];

3) *class-based understanding of poverty* that describes poverty as a product of socio-economic relations (K. Marx, P. Townsend, E. S. Reinert, etc.) [18; 24; 25];

4) *living-standards-based understanding of poverty* that determines poverty as non-compliance with accep-

ted in a certain society, sub-societies, or groups standards of life (H. Spencer, P. Townsend, etc.) [9; 24; 32];

5) *self-identification-based determinations of poverty* that explains poverty in terms of self-assessment of own well-being by a separate individual or by groups of individuals (S. Rowntree, C. Butt, etc.) [33–35];

6) *life-style-based determinations of poverty* that explains poverty as a specific-philosophical perception of the world and life. Such viewpoint was developed by Aristotle, Plato, Confucius, J. Bentham, as well by M. Weber, O. Lewis, and others [35–37];

7) *human-capabilities-based understanding of poverty* that considers poverty as a result of a person's or group's ability to improve own material state (A. Sen, etc.) [24; 38–40].

Each kind of poverty definition expresses certain aspects and different sides of such a unified and multifaceted phenomenon as poverty is. However, determining the concept of poverty and, therefore, understanding it depends on the diversity of the types of poverty.

The variety of poverty types and their clusters

The study of poverty-related scientific literature and normative documents revealed a significant diversity of types of poverty, allowing them to be grouped into clusters.

Cluster of basic types of poverty. There are three types of poverty that could be considered as classical (basic) types of poverty – absolute poverty, moderate poverty and relative poverty.

Studying a poverty issue, economists, sociologists, and political scientists, as well as politicians, and public servants, most often are focused on absolute poverty, which, compared to other types of poverty, has historically earliest emerged and earliest attracted the attention of scholars and politicians.

Absolute poverty (extreme poverty, subsistence poverty) is defined as a situation when individuals, group of individuals, or household due to their low income can't satisfy their basic (or most essential and common) needs in food, clothes, dwelling and therefore can't satisfy the minimum requirement for biological survival.

An analysis of the views held in the scientific literature has shown that there is a narrow and broad understanding of absolute poverty.

The narrow understanding of absolute poverty stems from the assumption of whether a person is hungry or how hungry he or she is.

A broad way of poverty understanding means that along with lack food people are deprived of clean water, sanitation, health care, shelter, and information [41, p. 20].

Moderate poverty is considered as a situation where the individual's and household's income and consumption are higher than the cost of the food basket, but cannot reach the lowest level of the welfare.

Relative (deprivational) poverty is defined by comparison of individual's real-life condition with the living standards of the (sub)society where the individual lives.

Poverty assessment cluster. Poverty studies are based on subjective and objective assessment. By this a way objective poverty and subjective poverty can be distinguished.

Objective poverty is based on the objective approach to poverty investigation, that proceeds from a monetary understanding of poverty and considers poverty from a position of insufficient income and lack of other material resources, while *subjective poverty* that comes from a subjective approach of poverty investigation stems from a personal assessment of own well-being by a person.

Poverty origins cluster. By its origins, poverty could be divided on primary poverty and secondary poverty.

Primary poverty is defined as insufficient income to meet basic needs like food, clothing, etc., and maintain



physiological efficiency under conditions of rational spending of the existing income, while *secondary poverty* is a situation when in the conditions of enough financial resources a person experiences insufficiency in satisfaction of basic needs due to the irrational using of the existing financial resources [33–35].

By dividing poverty into primary and secondary poverty, it is possible to distinguish two groups of poor: those who are really poor (primary poverty) and those who irrationally use existing material resources (secondary poverty).

Poverty manifestation cluster. By its manifestation, poverty could be registered and unregistered.

Registered poverty is poverty that is officially recognised. Therefore, it is *official poverty*.

Registered or official poverty is poverty, which is defined in terms of the poverty line officially established in the country.

Unregistered poverty is poverty that exists in reality but isn't defined by officials and therefore it could be invisible. By such viewpoint this type of poverty can be called *invisible poverty*.

Cluster of the poverty nature. According to its nature, poverty could be monetary, material, and economic.

If *monetary poverty* implies a lack or insufficiency of cash, *material poverty* is a shortage of material resources necessary to meet people's daily needs [42–44]. That is, if monetary poverty is related to income, material poverty is related to consumption.

Economic poverty – is a concept applied to the able-bodied population who, due to the conjuncture or other causes created in the labour market, are unable to provide themselves with adequate living conditions. Economic poverty is a broader concept than just a lack of finance and includes fewer opportunities for employment and, therefore, resource allocation and appropriation.

Poverty sustainability cluster. According to poverty sustainability, there are a wide set of poverty types.

Sustainable or traditional poverty is a situation when poverty produces poverty. It is hereditary poverty, or the permanent transmission of poverty from one generation to the next in a family or country, that creates the phenomenon of a vicious circle of poverty [9–11].

There is a widespread opinion in the economic, political, sociological scientific literature [9–11; 25; 45; 46], that, independent of the causes of poverty, it is characterised by permanent self-reproduction. It is believed that the poorer a country or a person is, the higher is the probability to fall into a vicious circle of poverty.

By its essence, sustainable poverty stands close to structural poverty.

Structural poverty is seen as an integral part of public life, which takes place in both developing and developed countries. Structural poverty is attributed to poor people or poor families whose ability to overcome poverty is minimised.

Structural poverty is caused by the particularities of structure or management of public life [47, p. 25]. This type of poverty is seen as a naturally determined phenomenon of public life that cannot be resolved by public progress alone. Structural poverty is often considered, as a useful example of public life, that demonstrated how people expelled from society live and how people should not live.

Chronic poverty is a situation where there is a systematic recurrence of poverty, localised in certain groups or regions over a long period of time when several generations of the population are unable to cope with the causes of poverty. All of this makes the look at poverty as an irreversible phenomenon and causes significant changes in the lifestyle of the population, in norms of behaviour, in human psychology, and in thinking.

Floating poverty is a situation where part of the poor finds an opportunity to move into a materially better state, while part of the middle class or wealthy population goes bankrupt and becomes poor. Floating poverty is also characterised by the situation when the material condition of an individual or household sometimes for some reason worsens and falls below the poverty line, sometimes it improves and the individual or household moves up to the so-called state of wealth. Floating poverty is a much rarer occurrence than sustainable poverty.

Cyclical poverty is related to the cyclical fluctuations of the economy and the declining phase of the economic cycle. That is, cyclical poverty arises under certain conditions of economic conjuncture, and it is expected that it will cease to exist with the change these conditions.

Cyclical poverty is closely chimed with episodic or temporal poverty.

Episodic or temporal poverty is poverty caused by certain factors, which lasts for a relatively short period of time and ends after overcoming of these factors.

Along with episodic (temporary) poverty there is also situational poverty.

Situational poverty is the transition of an individual or household in the position of poverty for a relatively short period of time due to various life accidental circumstances (illness, family problems, etc.) or the influence of individual or household incorrect behaviour. Situational poverty is mainly characteristic of developed countries.

It is believed that the most common cause of situational poverty is job loss and, therefore, loss of income. Thereby could be observed to a direct link between situational poverty and unemployment.

Another type of poverty is the so-called new poverty, which in its content is close to situational poverty.

New poverty is a relatively new term and is related to the origin of the new poor as a phenomenon and as a concept. The new poor appeared in the developed world after the socio-economic crisis of the 1970s. The new poor include two categories of people: on the one hand, they are people who in the past, before losing their



jobs, were well-paid highly qualified specialists, and on the other hand, this category of poor is often attributed to children of relatively wealthy families who cannot find a job after school or higher education graduation and live at the expense of their parents.

New poor significantly differs from ordinary unemployed people because they usually experience less severity of material income loss or its absence. But at the same time, the loss of jobs and income is a strong psychological press for them.

Understanding new poverty applies not only to individuals but also to families.

The new poverty is distinguished and defined by the transition from a stable material and status position into an unstable state.

New poverty and new poor as an event and concept can be spread on the post-socialist space when the breakdown of existing economic ties in the 1990s and the closure or reorganisation of most enterprises or various organisations aggravated employment problems and a large number of highly qualified staff (engineers and technologists working in factories and mills, teachers working in higher and secondary educational institutions, and others) were left without jobs and incomes.

New poverty and new poor as an event and concept can be spread also in the post-socialist space when the breakdown of existing economic ties in the 1990s and the closure or reorganisation of most enterprises aggravated employment problems and a large number of highly qualified staff (engineers and technologists working in factories and mills, teachers working in higher and secondary educational institutions, and others) were left without jobs and incomes.

In addition, political, economic, structural, and social changes in the 1990s significantly reduced overall employment levels, and the majority of the population who previously had stable employment and incomes found themselves unemployed and without income, which led to many negative outcomes.

At the present stage, the new poverty of post-socialist countries is identical to the poverty that arose in the West developed countries in the 1970s.

Poverty distribution cluster. Within this cluster of poverty, the endemic poverty, local poverty, individual poverty, and global poverty could be considered.

Endemic poverty that is also known as widespread poverty or collective poverty, occurs when the national income of a country is so low that it fails to provide adequate living conditions for the population. This kind of poverty characterised by such aggregated indicators as low per capita GDP, low level of final consumption, low life expectancy, high mortality rate, etc.

Local poverty is poverty, which includes certain geographical regions, separate social or demographic groups.

Individual poverty is poverty discussed at the individual level, it is person-equivalent poverty [48; 49]. The

definition of individual poverty is based on material (including monetary) and immaterial understanding.

Global poverty is seen as the most important problem of modernity around the world [48], as poverty, most of which is concentrated in developing countries [29, p. 1, 8]. Global poverty is directly linked to absolute poverty, and its limit is 1.9 US dollars per day.

Cluster of exclusion. In the cluster of exclusion, the social poverty, political poverty, cultural poverty, and spiritual poverty are included.

Social poverty or poverty of disadvantaged is the poverty of vulnerable groups such as unemployed pensioners, single people with disabilities, large families, single-parent families, etc.

Social poverty is one of the most difficult components of poverty typology. Scientists opinion regarding this type of poverty widely varies. Thus, some authors view social poverty as an exclusion from a society in which an individual lives, as a lack of family support [50, p. 8; 51]. Thus, such a point of view puts social poverty in direct connection with the scarcity or absence of social capital. In addition, social poverty can be defined as the poverty of the associative elements of society (the homeless, the drunks, the drug addicts, etc.). From this point of view, it would be more appropriate to call this type of poverty *associative poverty*.

Political poverty is defined as an exception from the public and civic decision-making process [50, p. 8], which is associated with the negative impact of human inequality.

Political poverty is the inability of certain groups of the population effectively participate in democratic processes, to «initiate discussion of the issues they need», which «makes them vulnerable to the consequences of their decisions» [52, p. 25].

Political poverty pushes people out of the public sphere. Therefore, people lose the opportunity to influence the current socio-political processes in the country and protect their interests. These people take the observers position and their civic and social passivity is perceived by the government as sharing their policies and consent with ongoing processes [52]. Such a passive position is taken not only by the extremely poor marginalised, homeless people or people with low qualifications and low incomes, but also the vast majority of the intellectual elite of the country – doctors, teachers of secondary schools and higher education institutions, researchers, etc., who may be either members of economic poverty or new poverty, who due low incomes or lack thereof are more preoccupied with solving the problem of survival and therefore do not fully participate in the socio-political life of society. They fail to make useful decisions for themselves and thus further strengthen their unfavourable situation, as the levers of decision-making are increasingly concentrated in the hands of the political elite. In turn, the political elite uses this opportunity to pursue their own interests.



Cultural poverty is created in a certain public environment and has all characteristics of this space. Cultural poverty is a combination of beliefs, attitudes, values, and practices that arise from sustainable poverty, that grow over time and do not change according to structural conditions [36; 37]. According to O. Lewis poverty changes the morals of poor people and children who emerge and grow up in poverty, master the habits and behaviours characteristic of their circle, local (often negative) culture like laziness, carelessness, indiscipline, etc. Therefore, it will be difficult for children born and raised in poverty to escape from this environment in the future.

Thus, cultural poverty will become the basis for the poverty of future generations [29, p. 725; 34; 35; 53, p. 26] and create conditions for the immortality of poverty.

Cultural poverty is the result of economic poverty and it is seen as part of a culture of poverty, which, in turn, is an integral part of a larger-scale problem – poverty in general.

Spiritual poverty is a specific form of poverty, which in the given case refers not to a person's moral character or low level of spiritual and moral development, but to people's inability to provide for themselves without the help of charities or rich people.

The diversity of types of poverty largely depends on the variety of causes of this complex socio-economic phenomenon. In determining the various types of poverty, we must remember that all these aspects relate to various aspects of one phenomenon – poverty. Therefore, it is sometimes difficult to draw a line between different types of poverty, which is why some forms of poverty can be mutually exclusive.

Conclusion

Fighting against poverty usually derived from the economic understanding of this phenomenon and is based on the economic methods of struggle against it. As scientific researches and socio-historical practice have demonstrated, such an approach could not solve the poverty-related problems, could not reduce poverty. It does not provide a more or less complete and comprehensive answer about sources of poverty and the perspectives of their overcoming and, therefore, it cannot achieve some sort of positive results.

Poverty is a complex and multi-dimensional socio-economic phenomenon and its investigation is related to a set of difficulties that claims to identify and estimate, to define and improve the theoretical and methodological peculiarities of its investigation.

Based on the analysis and systematisation of definitions of poverty that were given by different governmental and non-governmental organisations, different scientific literature and other sources, six different cri-

teria of poverty definition are distinguished in the paper. Additionally, the paper defines 34 different titles of 27 types of poverty, that are classified into 8 clusters of poverty. It can be expected an increase in the number of poverty types along with feather development of the theory of poverty, that might to change some aspects of the given classification which will contribute to the subsequent improvement of the proposed approach to the investigation of types poverty.

The economic development of a country and social-economic politics of struggling against poverty as well as the social security of poor people should be considered as a united strategy that should be based on the analysis of poverty reasons that can provide efficient approaches toward poverty overcoming.

The specification of poverty essence and the systematisation of its types given in this article will be useful for a further deeper understanding of poverty reasons and to define effective ways for poverty overcoming.

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