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Introduction to the Special Issue in Celebration of Amartya Sen's 85th Birthday

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That Amartya Sen had a seminal and profound influence on the human development paradigm and the capability approach hardly needs a reminder. He served as an advisor to the very first *Human Development Reports* and contributed to the development of the human development index. Sen is also generally regarded as the contemporary initiator of the capability approach, although it has been pointed out repeatedly, by Sen himself and by others, that the core notions of a functioning was crucial in the work of Aristotle, and hence also in the work of philosophers and economists who have been greatly influenced by Aristotle.

It is unlikely that Sen had expected the enormous influence that his work on the capability approach would have had a few decades later. Today, as the publications in this journal testify, the capability approach is used by scholars and researchers from a variety of disciplines and fields, in countries across the world. The type of work in which the capability approach is used also differs remarkable—ranging from the development of philosophical theories to applied empirical studies that guide policies for the government as well as civil society organizations, to theoretical or empirical measurement.

It is not unlikely that the founding of the *Human Development and Capability Association* 15 years ago has positively contributed to the further development of the human development paradigm as well as the capability approach. The HDCA, of which Amartya Sen served as the first president, has tried in various ways to connect students, scholars and practitioners across disciplines and across continents. Members of the HDCA have also collaborated and contributed to a better understanding of the human development and capability approaches, for example by offering accessible Summer schools preceding the annual conference, or by drawing on the growing number of experts in this field for providing comments on papers submitted to this journal.

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This special issue of the *Journal of Human Development and Capabilities* is in honor of Amartya Sen who turned 85th last November.

This is no reason to be complacent with what we have achieved, but rather raise our ambitions, and prompt us to think of ways in which we could do better. We are therefore grateful for the reflections of Martha Nussbaum, who was the second President of HDCA, after Amartya Sen, on what she sees as the challenges and opportunities for the HDCA in the near future, which are published as the second contribution to this special issue.

There are many characteristics that make Amartya Sen stand out among his peers, yet one remarkable feature has been the range of disciplines and debates to which he has made contributions—and, indeed, often highly influential contributions. He can rightly be characterized as a *Homo Universalis*—a scholar who does not regard disciplinary boundaries as a valid reason to stop asking questions, but instead takes the intellectual liberty to pursue answers to all the questions that he finds urgent, important, or simply interesting. In that treacherous but important terrain between economics and philosophy, Amartya Sen may well be the most prominent living thinker in the world.

Ten years ago, when Sen turned 75, Kaushik Basu and Ravi Kanbur edited a two-volume *festschrift*, *Arguments for a Better World*. The contributions in that volume covered the entire breadth of Sen's work—including, for example, his work in social choice theory that is not related to the capability approach, or his contributions to the history of ideas. For this special issue, we felt it to be appropriate to focus on those areas of Sen's work that are especially relevant to the interests and work of readers of this journal. And still, even within this more focused setting, the breadth of the topics and issues on which Sen has worked is very visible in the contributions to this special issue, which each engage in many different ways with Sen's work, or present analyses that make use of his thought.

In the first paper of this issue, T.M. Scanlon engages with Sen's contributions to the most fundamental aspects of theories of justice—their justification. Both Scanlon's theory of justice, as well as John Rawls's theory of justice, are contractualist theories of morality, which use a *procedure* in deciding what justice entails. In his book *The Idea of Justice*, Sen advanced two objections to such theories that Scanlon addresses in his paper. One critique concerns the question who are the members included in the procedure. Sen favors Adam Smith's idea of "impartial spectators" in which distance voices should also be consider in order to avoid parochial biases. The second critique, which focusses on enlightenment relevance, makes the claim that contractualist theories are epistemically deficient if they do not take into account the views of a wider range of people. Scanlon engages with Sen's critiques in detail, laying out distinctions that need to be made in assessing how they affect Rawls's theory of justice, as well as Scanlon's own theory. The paper thus contributes to the philosophical discussion on how to make sure theories of justice are justified, and engages with Sen's call in *The Idea of Justice* to debate not only the content of theories of justice, but also the meta-theoretical questions related to what we believe a proper theory should look like, at a more abstract level.

Mary Kaldor's essay is an engaging account of various philosophical conceptualizations of the notion of human identity and the marshaling of these in today's world for promoting top-down authoritarianism and sectarian coalitions, and the fracturing of democracy. Amartya Sen's book *Identity and Violence* was a deep reflection on various forms of collective and group identities that bind individuals, and how these could be forces for good and also sources of conflict and violence. Mary Kaldor begins with Sen's work and shows how it has acquired an importance in our contemporary life. Sen had talked about different kinds of identity, from singular, solitaristic ones to multiple identities, that characterize most of us, most of the time. Kaldor focusses on and develops further Sen's idea of singular or solitaristic identity and how this can be harnessed and even stoked by interested groups and authoritarian leaders to promote their own interest and societal fragmentation. She shows

how singular identities are constructed through violence and harping on old conflicts and selectively highlighting faded histories. Given the urgency of this topic in today's world, this is an important essay that draws on Amartya's Sen's political philosophical works and uses them to shed light on some of the most compelling concerns of our contemporary world.

Mozaffar Qizilbash builds a conversation between the work of Tim Mulligan and Amartya Sen. In his book *Ethics for a Broken World*, Mulligan asks how we would look at contemporary ethics and political philosophy in a world characterized by catastrophic climate change, in which not all basic human needs can be met. Sen's work is not discussed in detail in Mulligan's work, yet Qizilbash's careful and detailed analysis of Sen's publications shows that he has much to offer for thinking about ethics in a broken world. Some of that work is very applied and empirically driven, such as Sen's work on famines or gender disadvantage in survival, while other work is much more abstract and theoretical. Qizilbash then responds to the possible criticism that Sen hasn't written very much on ecological sustainability or climate ethics, despite the importance of that topic for questions of justice and human development. Qizilbash responds that not only has Sen written several pieces on sustainability, we should look beyond a simple counting of the number of pages he has written on ecological unsustainability, and rather investigate what Sen's more abstract and theoretical work can contribute to thinking about ethical questions related to the freedoms and quality of life of members of future generations. Qizilbash thereby presents evidence that Sen had an important influence on the work of the Oxford Philosopher Derek Parfit, who has written some of the most important work on intergenerational justice, which is one question at the core of what should concern us when thinking about the ethics of a broken world.

In the next paper, Siddiq Osmani relates Sen's searching discourses in rationality to the emerging field of behavioral economics. He shows not only the extent to which Sen's writings are a precursor to perspectives which are now being applied across mainstream economics, but also that in these writings lie the seeds of answers to conundrums in the new literature. First, he argues that many "anomalies" (to quote the title of a regular item in the *Journal of Economic Perspectives* by Richard Thaler, who won the Nobel Prize for his contributions to behavioral economics) are actually not violations of rationality in the broader sense that Sen introduced in his writings—the issue is not with rationality per se, but with the rather narrow definition of it in mainstream neoclassical economics. However, second, some of the anomalies do suggest reformulations of rational choice, and Sen has provided a way forward on this, for example in his distinction between "culmination outcomes" and "comprehensive outcomes." Third, where the evidence calls for truly radical departures from even a broad rational choice framework, Sen's contributions are again incisive, for example in distinguishing between "sympathy" and "commitment" as the basis for other regarding behavior.

One important area of Amartya Sen's research has been inequality, from its measurement to various conceptualizations and their implications for human well-being. Jayati Ghosh, in her paper, focusses on an important distinction—that between "distributive inequality" and "relational inequality." For most economists, inequality is, almost by definition, distributive. It is concerned with how income is distributed or wealth is distributed or baby-food is distributed. But Ghosh, founding her argument on Amartya Sen's capabilities approach, and also the writings of Elizabeth Anderson and Martha Nussbaum, persuades us of the importance of what in her chapter is referred to as relational inequality. The outcaste or the racially stigmatized, who is given short-shrift in social gatherings, even if she were given all the food and money, could be said to be deprived in an important sense. In developing this powerful idea, Jayati Ghosh brings out the intellectual dilemmas. She shows how

some of these relational inequalities have led to hierarchies in social relations and, ironically, how these can be useful for driving certain kinds of growth. Using the labor market as focus and contemporary India as the laboratory, she illustrates important ideas, such as how relational inequalities can have negative feedbacks on production and distribution.

The interplay between conceptualization and empirical testing has been at the heart of Sen's approach to economic analysis. His classic study of the 1943 West Bengal Famine, for example, combines the basic concept of the set of food bundles to which market incomes and prices provide "entitlement" together with meticulous documentation of the origins and consequences of the famine from multiple data sources. In the last two decades a new type of data source has come on to the development scene, that of Randomized Controlled Trails (RCTs). Naila Kabeer's paper provides an assessment of the RCT methodology, drawing theoretical framing from Sen's capability approach, with specific application to impact assessments to two Targeting the Ultra Poor (TUP) programs, one in West Bengal and one in the Sindh Province of Pakistan. RCT evaluations of the programs are themselves evaluated, in light of qualitative assessment carried out by teams of which Kabir was a member. Her argument is, to use words familiar in the RCT evaluation literature, that despite the claim (or hope) that RCTs "clinch" the argument, in fact they only "vouch" for them. This is because, as demonstrated by the qualitative assessments, in practice RCTs depart from the idealized form needed for them to be "clinchers."

Amartya Sen has a great interest in many fields of policy making, but perhaps two stand out: global health and education. Melanie Walker's contribution to this special issue uses Sen's work on capability, education and public reason to argue that formal education should aim at developing the capability of public reasoning in all the students. She thereby makes use of Miranda Fricker's introduction of the idea of an epistemic contribution capability, to argue that students should be given the capability to contribute both information materials as well as interpretation materials to the practice of public education. Walker draws from her longtime scholarship on education in the Global South, particularly South Africa, to show how this capability can be fostered, and also how it can be thwarted. Her empirical research also makes a clear case that an adequate standard of living (that is, not being confined to poverty and destitution) are necessary for students to flourish and for this capability to be fostered. Walker's paper is thus not only addressing and advancing our thinking on some issues that have been of central concern to Amartya Sen—in particular, education and public reasoning—but also using both his and others' work to advance our thinking on this matter, in an empirically informed way.

Selim Jahan was Director of the Human Development Report during 2014–2018, having previously been the Deputy Director 1996–2001. So he has a deep knowledge of the evolution of the Human Development paradigm as translated into policies, within international agencies and national governments. The key idea advanced in his paper is that of universalism, or "human development for everyone." Universalism in Jahan's sense means a focus on the specific groups who have been left behind. These include "women and girls, indigenous peoples, persons with disabilities, ethnic minorities, migrants and refugees and so on." Such groups exist in every society, but every society will have specificities, and still other groups, which need to be identified and their deprivations measured and analyzed as a first step in formulating policies of universalism. Jahan emphasizes the key role of understanding social values and norms in analyzing the roots of group specific deprivation. Further, as he says, "To find out if everyone benefits from the human development progress, an average perspective is not going to work—a disaggregated approach is needed." This has implications for the way in which data is collected and categorized. To ignore deprivations of

the disabled because we have not bothered to collect sufficiently disaggregated data is not good enough. Without such data, targeted policies cannot be devised or implemented.

This set of papers offer not only a wonderful tribute to the work and influence of Amartya Sen on so many contemporary debates that are of great importance, but also make significant advances in several disciplines. Together with the authors of these papers, we join Amartya's students, friends, collaborators, and all those who have been inspired by his work, in sending Amartya the very best wishes for his 85th birthday. We look forward to his continued engagement with Human Development and Capabilities, and with the Association he co-founded 15 years ago.

Disclosure Statement

No potential conflict of interest was reported by the authors.

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