

## **MODERN METHODS OF ASSESSING POVERTY**

**Mahsutaliyev Abdusalom Hasanovich**

Associate Professor, Tashkent State University of Economics

This article examines modern methods of assessing poverty, the study of the poverty category and the identification of factors shaping poverty, the justification of the real poverty level in countries and the main directions of its reduction, and the important characteristics and evolution of the poverty category from a theoretical and practical perspective.

**Keywords:** poverty, poverty assessment, poverty line, subsistence minimum, minimum consumer basket, social protection.

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The problem of poverty has always been a topic of social and philosophical reflection. Leading economic thinkers of the liberal trend (A. Smith, T. Malthus, D. Ricardo) considered poverty to be an inevitable consequence of the transformation of traditional society into an industrial society.

In the mid-19th century, social Darwinism became the main liberal ideology. Its main idea was that poverty was considered a natural phenomenon and should increase with the growth of social production. Poverty initially meant that a given individual did not have the ability to protect himself for the continuation of the race, for the continuation of life. According to G. Spencer, poverty plays a positive role, being a driving force for the development of the individual. The representative of the ideology of neoliberalism, F. Hayek, also considered poverty to be a natural phenomenon in human society and necessary for the public good.<sup>1</sup>

The quantitative definition, which is the official definition of poverty in the US Social Security Administration, was developed by M. Orshansky. Among the authors who have devoted their work to the study of poverty in Russia are V. Zharebin, V. Kushlin, K. V. Kopach, A. Bachurin, S. Belozeroval and others<sup>2</sup> There are also scientists who study the causes of poverty and the underprivileged, including A. Razumov, A. Sorokina, V. Sycheva, M. Vyshegorodtsev, S. Yaroshenko.<sup>3</sup> Methodological aspects of studying the problems of poverty among workers, the

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<sup>1</sup>Hayek F.A. Bad self-righteousness: excessive socialism. Pod ed. Bartley U.U. - M., 1992.

<sup>2</sup>Jerebin V., Romanov A. Economics domashnikh hozyaystv. - M.: "Finance. UNIT", 1998. - 231 pages.

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<sup>3</sup>Razumov A.A. Russia: podgotovka strategii borby s bednostyu, analiz i metodologicheskie podkhody. - M., 2001. S. 15.

differentiation of consumption of various socio-demographic groups and the importance of territorial factors in determining the level of well-being, and institutional analysis M. Magomayev, V. Raisin, A. Surinov<sup>4</sup> reflected in his works.

The approaches to studying the category of poverty and identifying the factors that shape poverty, justifying the real level of poverty in countries and the main directions of its reduction, studying extensive empirical materials, comparing different things, and studying the category of poverty are described in the works of the above-mentioned scientists. According to them, to achieve the goal, a number of tasks need to be solved:

- review the important characteristics and evolution of the poverty category;
- clarifying the definition of the category of poverty in the modern economic system;
- study methodological approaches to poverty assessment;
- study global trends in poverty development and methods of combating them
- identify the causes and characteristics of poverty in each country;
- identify the main contradictions of poverty and propose ways to solve them;
- develop key areas for poverty reduction within the framework of an institutional approach;
- Identify priority institutions to overcome poverty.

There are many scientific attempts to define poverty, but all researchers emphasize that this concept is multifactorial and historically conditioned.

Poverty is a state of persistent lack of resources necessary to ensure an acceptable standard of living in a given society. Therefore, the main condition for classifying a person as poor is an objective lack of resources. If such a way of life is chosen voluntarily (for philosophical or religious reasons), then he is not considered poor.

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<sup>4</sup>Magomayev M.M. Bednost i mezhnyy ee preodoleniya: Uchebnoe posobie. - Makhachkala, 2004. S. 14.  
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Surinov A.E. Doxody naselenia. Opyt kolichestvennykh izmereniy. М., 2000. S. 306-309.

Theoretical and methodological requirements for a comprehensive study of the problem of poverty were formed as early as the 18th century. Research was conducted in two directions: social Darwinism and social equality.

Representatives of the first trend - G. Slesinger, F. Giddings, PJ Proudhon considered poverty not only natural, but also useful. Inequality and the poverty arising from it are the driving force for the development of the entire society. This concept is based on the principles of the struggle for existence, the inevitability of social inequality and the futility of social reforms, all social phenomena that harm society and the poor, including poverty, were considered through the theory of Charles Darwin. According to it, the fittest survive. The poor themselves are responsible for the material difficulties that have led them to poverty.

In the middle of the 19th century, the representative of English classical sociology, G. Slesinger, published his "Social Economy"<sup>5</sup>In his book, he emphasized that poverty and inequality are natural phenomena that arise with the growth of social production. But it is impossible to stop production, therefore it is impossible to eliminate poverty. The author considered poverty not to be a social phenomenon, but a personal problem of a person. Some people are able to adapt to social conditions, while others fail. In his opinion, the state should not interfere with the natural development of society. He emphasized that the poor need state assistance, the burden of care (through tax benefits) more than other segments of the population. In general, G. Slesinger considered the positive role of poverty as a driving force in the development of personality<sup>6</sup>.

According to Sychev's work, F. Giddings believed that the poor voluntarily become social parasites. He recognized poverty as an inevitable evil, at a certain stage a social good, an inevitable companion of social progress.<sup>7</sup>

According to AVSorokina, poverty is a social asset, and only with an increase in labor productivity will real prospects for overcoming poverty open up.<sup>8</sup> Overcoming poverty is considered by representatives of the socially egalitarian approach as the main principle of organizing universal social life. In their opinion, inequality and poverty are unnatural for society and must be fought against. Poverty, they argue, affects the elimination of public ownership of the means and means of production with general equality. In particular, in the former Soviet Union, poverty was understood as a lack of means of production among those who, through their labor, contribute to the accumulation of wealth among their owners. At that time, sociologists and economists were convinced that poverty was a form and measure of the exploitation of workers. They argued that the development of productive forces and commodity-money relations, as well as the degree of parasitism of the ruling class, are determined by very abstract units for the criterion of poverty: ownership of the means of production and the degree of exploitation of workers, which is not poverty itself, but essentially leads to conflicts between people.

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<sup>5</sup>Slesinger G.E. "Sotsialnaya ekonomika" - M.: "Delo i servis", 2001. 360 p.

<sup>6</sup>Slesinger G.E. "Sotsialnaya ekonomika" - M.: "Delo i servis", 2001. 360 p.

<sup>7</sup>Sycheva V.S. Измерение уровня бедности: a historical question. - M., 1996. No. 3. S. 142.

<sup>8</sup>Sorokina A.V. Funktsii bednosti: analiz zapadnykh koncepsiy i realii rossiyskoi deystvitelnosti // Vestnik Nizhegorodskogo universiteta im. N.I. Lobachevsky: series social science. 2002. #1. S. 219.

The poverty line was determined not by the average standard of living of the majority of the population, but by the level of consumption of the wealthy minority. Wealth and poverty are the main indicators that affect the social development of society. In the development of the problem of poverty, many Western sociologists associated it only with capitalist society. Here, attention was paid not to the economic aspects of poverty, but to the mechanisms of reproduction.

In the second half of the 19th century, a statistical-sociological trend emerged. Representatives of this trend, C. Booth and S. Rountree, were engaged in empirical studies of the living conditions of social groups and considered poverty to be a social disease of society. Their methodology took an absolute approach to poverty, which was determined by the ability of a person to satisfy his basic needs for food, clothing and housing; they tried to calculate the minimum subsistence level necessary for families to purchase the necessary things, named by experts. C. Booth, F. Hayek studied the real criteria of poverty - the level of income and satisfaction of basic needs; the norms and standards necessary to maintain a certain level of work and health<sup>9</sup>.

In his study of poverty, S. Rountree calculated the funds spent on simple physical health needs, and included in the funds that families should use for health in this direction funds for newspapers, stamps, writing paper, radio, holidays, beer, tobacco and gifts. Having studied families, he came to the conclusion that there are two types of poverty: the main one is families whose funds are not enough to meet basic needs even with reasonable use of funds; the secondary one is families whose basic needs are not met due to unreasonable spending of funds. He put forward an idea that had not been mentioned before: it is necessary to study the poor and the wasteful separately, because the wasteful are the ones who affect poverty, he said. He also divided responsibility for poverty into personal and social. Analyzing the data, he tried to calculate the actual number of people in need by linking poverty to unemployment and wage levels. He emphasized that it is necessary to first determine the criteria for income, housing conditions, and the poverty line, and then determine it based on the family income necessary to meet only basic needs (food, shelter, clothing).

He found that the absolute poverty line, regardless of the level and distribution of personal income, can only be adjusted when food prices change.

By his methods and principles, W. Seitz also had a great influence on the subsequent development of poverty theory. Poverty researchers of the twentieth century, despite their attempts to make some changes, almost copied them. without eliminating poverty. It is possible to reduce it, but for this it is necessary to increase the general well-being of the population<sup>10</sup>.

In the 1960s, a new approach to poverty emerged. M. Orshansky studied the works of Sachs and, according to him, while working for the US Social Security Administration, established

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<sup>9</sup>Hayek F.A. Bad self-righteousness: excessive socialism. Pod ed. Bartley U.U. - M., 1992. 2 Macaulay Alaster Opređenje i izmerenje bednosti // Bednost: vzglyad uchenyx na problemu. - M., 1994. P.25-26. 3 Manning N. Russia v bede // Mir Rossii. 2001.-No. 1. S. 17. Magomaev M.M. Bednost i mezhnny ee preodoleniya: Uchebnoe posobie. - Makhachkala, 2004. S. 14. 5 Razumov A.A. Russia: podgotovka strategii borby s bednostyu, analiz i metodologicheskie podkhody. - M., 2001. S. 15. 6 Yaroshenko, S.S. Syndrome bednosti // Sotsiologicheskii zhurnal. 1994. #2. S. 25. 7 Muzdybaev K. Economic deprivation, strategy and prevention and search for social support. SPb, 1996. 8 Surinov A.E. Dohody naseleniya. Opyt kolichestvennykh izmereniy. M., 2000. S. 306-309

<sup>10</sup>William Zeits "Where is the Jew? Indicators of poverty, average consumption and middle class in Central Asia and regional levels"-[wseitz@worldbank.org](mailto:wseitz@worldbank.org); Williams F. Social Policy: a critical introduction. L. 1994



quantitative parameters for housing, clothing, etc., necessary to meet basic needs. According to M. Orshansky, the poverty line (or minimum family income) was calculated and tripled depending on the cost of food for the household ration. A 1955 study showed that an average family of three or more people spends about 35 percent of its income on food. The subsistence minimum or poverty line is projected for the future and indexed in accordance with price dynamics<sup>11</sup>.

In 1979, Peter Townsend published a major work in this field in the UK. In his research report, *Poverty in Britain in the 1960s and 1970s*, the author gives a definition of poverty that had a decisive influence on both the course of the study and its results: "If the majority of the population cannot afford to eat, to seek shelter, and to enjoy the pleasures of life that are available to the majority, then these individuals, families, and groups of people are condemned to live in poverty. They may live in a society that affects them in terms of their perception of inequality."<sup>12</sup>

Townsend was criticized for using the term "poverty" too broadly, but his conclusion that relative poverty exists in all societies is widely accepted. Unlike Townsend, Mack and Lanceley proposed a concept of poverty that was related to private expenditures and did not take into account public expenditures.

There is still no generally accepted definition of the concept of "poverty" in local science, and when conducting various surveys, they use definitions that describe this phenomenon from one side, in accordance with the specific purpose of studying it.

In S. Yaroshenko's scientific ideas about poverty, the poverty change algorithm is determined by three factors: prevention of initial poverty situations; calculation of the country's level of development and changes in the category of the poor; establishment of liberalism and social justice. Taking them into account, the author systematized the theoretical concepts of poverty and generalized "its three characteristics", namely the concepts of need, inequality, poverty (absolute, relative and economic dependence).

L.Ye. Surinov distinguished two definitions of poverty. The first type (absolute poverty) considers the poor as "a part of households that cannot afford the amount of benefits that are absolutely necessary to maintain their health and ensure average activity." Another type (relative poverty) considers the poor as a part of households with low (or the lowest) income. In his opinion, poverty is based on deprivation of benefits and inability to resist poverty indicators. This is a clear manifestation of social inequality. A complete refusal to consume against one's will is a feature of poverty and poverty.

Some authors, describing the phenomenon of poverty, are trying to reveal new forms of poverty that are manifested in society. In particular, S. Bykova and V. Lyubin draw attention to the difference between outdated (traditional, material) and new concepts. They say that poverty is a symbol of certain countries. The authors, based on the opinion of Italian researchers, believe that the only system in which poverty does not exist is the traditional system. Because everyone is

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<sup>11</sup>Saks DD., *Konets bednosti. Ekonomicheskie vozmojnosti nashego vremeni*. Pers. English N. Edelmana. - M.: Izd. Instituta Gaydara, 2011. -424p.

<sup>12</sup>Thompson DL, Priestley D. *Sociology*. M., 1998. S. 353.

equal there, and where there is no social inequality, there is no poverty. They simply believe that traditional residents seem to be "dragging."

Poverty as a socio-economic phenomenon is always and in any country manifested in two forms: absolute and relative. Absolute poverty is understood as the lack of necessary life resources for a particular population group. Even their ability to meet their minimum needs and lead a normal life is limited. One type of absolute poverty is poverty in which part of the population does not have the necessary resources to meet their natural (physiological) needs. Therefore, poor citizens are on the verge of survival. Relative poverty is determined by the ratio of the resources of certain groups of the population and the average standard of living of the population achieved in a given country.

In other words, relative poverty is not related to statistical indicators characterizing the level of the position of the poor, but to the satisfaction of needs and the average standard of living of the country's population. In particular, the income of the population directly affects poverty.

The population's disposable income and total income are closely related to the standard of living in relation to consumer prices. They predetermine the possibilities of daily consumption, and the consumption of goods and services by the population is one of the most important components of the standard of living. An improved, detailed analysis of the standard of living of different social strata of the population is based on the use of statistical data on the distribution of income in the country, as well as on welfare and consumption, since the uneven distribution of wealth leads to the separation of society into social strata. Therefore, it is necessary to calculate indicators of income differentiation (decile or quintile coefficient, Gini index) and use a set of the most important and decisive indicators that are convenient for practical use. The indicators of such a system must meet the following requirements:

- ensure systematicity in assessing the standard of living of the population, that is, describe the main components of the standard of living in a sufficiently complete manner and complement each other in such a way that they make it possible to provide a comprehensive assessment of this level;
- allow comparison with the previous period, between regions, as well as with other countries;
- the account should be understandable and not complicated;
- provide a simple method for self-measurement;
- calculation according to unified methods and maximum reliance on the statistical data being developed;
- having a generalizing nature.

Social standards are a guideline in the development of socio-economic policy, the basis for the distribution of wealth, a form of social guarantees and a public obligation of the state, which can take various forms. For example, they can be mandatory or recommendatory in the form of ideas about the desired level and quality of life or legally established norms. Most social standards are obligations to groups of the population and are provided for at the expense of the budget. State social standards are established through official regulatory legal acts, after which they become mandatory for use throughout the country. The size of the norms established by the state can be revised depending on the financial capabilities of the state and inflation rates.

Why is it necessary to measure poverty?

1. To compare the poverty situation of different regions of the country and households in them;
2. Research the trend of poverty change over time;
3. Compare poverty indicators between countries;
4. To conduct poverty monitoring;
5. To identify and implement poverty reduction strategies;
6. For analysis of work aimed at poverty reduction.

Various indicators are used to measure poverty. The most commonly used and simplest method is the poverty headcount index.

In measuring poverty, the level of low material security of households, as well as the income stratification of poor households, is reflected in the A.Sen index.

Where:  $L$  is the share of the poor population,  $N$  is the average share of income shortfall relative to the poverty line,  $d$  is the average income of poor households,  $P$  is the poverty line,  $G_p$  is the Gini index for poor households.

Principles in poverty analysis:

1. Clear and simple explanation;
2. Compliance with generally accepted concepts and descriptions;
3. Focus on implementing clear goals and measures;
4. Be technically and technologically sound;
5. Fast and life-like;
6. Ease of implementation.

In accordance with the approaches to setting state social standards, living standards indicators are divided into two groups.

The first group is standards designed to ensure minimum social guarantees. They include:

- subsistence minimum for certain groups of the population;
- minimum wage;
- the first category standard of the unified tariff grid;
- minimum pension amount;
- minimum cost of social assistance;
- standards for providing free education and medical services;
- standards for providing services to the disabled, the elderly, orphaned children and other groups of the population.

The second group includes "reasonable" or average standards, which are indicators of the real social situation and norms of social well-being. The second group includes the following:

- average salary;
- average pension amount;
- average housing availability;
- average per capita income;
- average value of quality of life indicators.

Unlike the first group, the standards of the second group are usually not norms, but rather indicators of the level of satisfaction of social needs.

Minimum social standards are a guarantee provided by the state for the survival of a person. The subsistence minimum includes the minimum set of food products, non-food goods and services necessary to maintain human health and ensure his viability. In other words, the consumer basket based on the subsistence minimum is the minimum standard for ensuring human life, which ensures not a decent life, but physical survival. Obviously, the minimum amount of wages, the minimum amount of pensions, the minimum average per capita income, the minimum scholarship cannot be lower than the subsistence minimum, because if this level of provision is not achieved, physical survival will begin.

The policy of a minimum living wage is characteristic not only of developing countries and countries with economies in transition, but also of developed countries. Therefore, the implementation of social reforms in this situation is especially important for countries in economic transition, since in these countries the old mechanisms have been broken to some extent and new ones have not yet been created.

In conditions of mass poverty, the main task of the state remains to deregister the category of people living beyond the subsistence level and create conditions for raising the standard of living of the entire population. It is the standard of living that becomes integral standards in conditions of socio-economic crisis. At the same time, the social standards of the state can also be reasonable, average standards. They are indicators expressing the level of development of social tasks and serve as guarantees of the accepted (decent) quality of life for a person in a particular socio-cultural environment. The social activity of the state is aimed at ensuring and developing average indicators characterizing the life of the majority of the population. In addition to integral indicators of the quality of life, specific indicators of the development of individual components of the social sphere are also important in the practice of social management. Such indicators include, first of all, the following:

- subsistence minimum;
- average per capita income;
- social payments, pensions, benefits, scholarships, and salary amounts;
- consumer price index;
- unemployment rate;
- Gini coefficient (ratio of population and income in a country);



- decile coefficient [ratio of the most and least prosperous deciles of the population (10 percentile groups)];
- minimum wage;
- tariff system for sectors and industries;
- retirement age;
- a single social tax rate or total payments to state social funds;
- the share of utility bills in total income.

This list can be expanded, since each area of social policy can be defined, on the one hand, by specific standards, and on the other hand, by indicators characterizing the existing social policy, determining the state's responsibility and allowing it to be controlled. The subsistence minimum budget represents the cost of the minimum set of food products necessary to maintain a person's health and maintain his life and activity, as well as expenses for non-food goods and services, taxes and compulsory services, based on the share of expenses for these purposes of low-income groups of the population.

Thus, the subsistence minimum budget represents the most “strict” type of the minimum consumption budget, intended for use only for a limited period of time - during periods of economic crisis. This budget, unlike the minimum consumption budget, which ensures the satisfaction of basic material and spiritual needs, is intended for physical survival and maintaining people's health. However, today it is the subsistence minimum budget that serves as the basis for determining the minimum wage, for calculating pensions, benefits, social assistance, scholarships and other social payments. Budget calculations of the subsistence minimum allow us to justify a system of social guarantees for the poor and vulnerable groups.

The calculation of the minimum consumption budget is relatively scientifically based, and it ensures the moderate restoration and development of the workforce of those able-bodied and the moderate life and activity of those unable to work.

The minimum consumption budget takes into account the costs of consuming relatively high-quality food, non-food goods and services, including paid services. The minimum consumption budget reflects the minimum limit of labor force, a moderate level of health and working capacity that meets the physical requirements of a person. This minimum consumption budget includes 75 types of food products, 45 types of clothing, 24 types of durable goods, 24 items of furniture, 31 items of tableware, expenses for culture, transport, communications, housing.

Now let's consider methodological approaches to the development of consumer budgets at different levels. The consumer budget, as a rule, includes several hundred goods and services at real purchase prices. This set of goods and services is called the consumer basket. Thus, the consumer budget represents a food and non-food consumer basket and includes services and tax payments.

The consumption budget usually includes the following types of expenses:

- food;
- clothing, underwear, footwear;
- sanitary, hygiene, and medical items;

- furniture, utensils, items intended for long-term use;
- housing and utility bills;
- cultural and educational events and recreation;
- household services;
- transportation;
- communication;
- others.

The consumption budget can be determined taking into account one person and a family of various composition, in the latter case we are talking about the consumption budget of the family. Special coefficients can be developed that take into account the decrease in the family budget due to the cohabitation of family members. This composition allows you to form a subsistence minimum for almost any family: couples with children and without children, single mothers.

In world and national practice, the food basket plays an important role in the subsistence minimum budget. The food basket is a set of food products (calculated based on the minimum standards of food consumption) designed for one person per month, which meets physical needs, ensures the required nutritional status and abundance of basic food products, and the implementation of traditional skills in organizing nutrition.

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