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The capacity to confuse: rescuing the Saint-Simonian notion of ability from modern capability theories of social justice

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“To each according to his ability, to each ability according to his works” constitutes the founding slogan of the Saint-Simonian doctrine (1825–1832). A century and a half would pass before Sen and Nussbaum developed their capability approaches, designed to consider issues of human development and quality of life. Given the prominence of capability approaches in the context of modern theories of justice, and perhaps also due to the natural analogy between the words ‘capacité’, ‘ability’, and ‘capability’, there is a clear tendency in the literature to analyse the Saint-Simonians’ contributions to justice based on the assumption that there is a conceptual link between the terms capability and ability. This paper claims, however, that the elision of these terms is unjustified, and is a source more of confusion than of enlightenment. A capability is an evaluative space for justice, while an ability is a property of individuals. The former is defined essentially in the domain of consumption and individual accomplishment, while the latter is clearly seen as a contribution to the theory of efficient production. Finally, these differences reveal a contrast in the focus values: the ability approach insists on efficiency, while the capability approach focuses on agency.

Keywords:

Social justice, Capability, Ability, Sen, Saint-Simonianism

JEL codes:

B10, D63

Adrien Lutz¹ & Antoinette Baujard² - The capacity to confuse: rescuing the Saint-Simonian notion of ability from modern capability theories of social justice

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1. Introduction

“To each according to his ability, to each ability according to his works” (à chacun selon sa capacité, à chaque capacité selon ses œuvres) constitutes the founding aphorism of the Saint-Simonian doctrine (1825–1832).³ The influence of ability is manifest in the history of economic thought, notably in the famous Marxian motto “From each according to his ability, to each according to his needs” (Marx [1875] 1938). As a doctrine which aims to improve the fate of the greatest part of society, Saint-Simonianism is hence closely bound up with the pursuit of social justice.

However, it is only recently that nineteenth-century social thinkers have been studied as social justice theorists. Frobert (2014) sheds light on the ‘socialistes fraternitaires’ Louis Blanc, Constantin Pecqueur and François Vidal, while Cunliffe and Erreygers (1999) focus on François Huet. Most of these nineteenth-century authors take a position on the ability approach similar to that developed in the *Doctrine de Saint-Simon* [DSS] ([1931] 1972). They thus participated in a change of perspective by lending credence to the idea that each individual is equal in law, and therefore entitled to the improvement of their social conditions without distinction of social rank or gender. This would provide the basis for a new form of distributive justice: social justice (Barry 2005, Miller 1999, Raphael 2001). The contributions of Saint-Simonianism to social justice and to this change of perspective remain understudied. Recent exceptions mention only that the Saint-Simonians were part of this evolution (Fleischacker 2004, Johnston 2011).⁴ In so far as *ability* appears as the core of the Saint-Simonian approach, thorough studies of this concept should help us to understand the changes brought about by commercial and industrial societies at the turn of the nineteenth century in France, and how a new approach to social justice then emerged. Ability may be contrasted with alternative valuation criteria such as *utility* or *capacity* – where the former

³ We use the original translations drawn from the literature on the history of economic thought, which is why we do not use the following forms: “to each ability according to her ability” and “to each ability according to its works.”

⁴ According to Fleischacker, this change of perspective has its roots in Hume ([1738] 1978, [1748] 1975) and Smith ([1759] 1982, [1762–63, 1766] 1982). The social thinkers had been known only for their desire to advocate a redistribution of wealth (Fleischacker 2004: 96). Saint-Simon, without really establishing a theory of social justice, paved the way for a “new peak from which to survey the terrain of justice” (Johnston 2011:167). The summit was reached by his school, and by the other social thinkers.

refers to Bentham's notion of utility, the latter to Sen or Nussbaum's concept of capability. This paper focuses on the latter.

The capability approach emerged at the end of the twentieth century as an alternative to both the Rawlsian and utilitarian theories of justice, intended as a way to consider issues of human development and quality of life. Our attention should be caught by the fact that the French word *capacité* in the Saint-Simonian context remains translated as 'capacity', 'ability', or even 'capability' – as in the capability context. With capability playing a significant role within theories of economic justice today, a question naturally arises regarding the role of the concept of ability for the Saint-Simonians, and whether it is related to the modern idea of capability.

In the field of social justice, the Saint-Simonian approach to ability and Sen's capability approach both have roots in an account of individual characteristics. Analogies can quickly be pointed out, so much so that one might be tempted to move from that analogy to an outright belief that there is a conceptual link. It is tempting to begin by considering the theories as close, and to proceed in one's thought from there. Indeed, after a decade's experience of seminars and conferences where the Saint-Simonians' approach to justice has been alluded to, it is quite clear that every discussion about ability starts with a primary question regarding the link with capability. Any argument regarding the Saint-Simonians' theory of justice patently presents a risk of being considered through the prism of capability, and the details of their account being lost in this confusion. In order to avoid any misunderstanding of the actual contributions of the Saint-Simonians, there is a need to resist the natural elision of ability and capability, and to explicitly set out their commonalities and differences.

Since the immediate question of the link between the two approaches has tended to block a clear presentation of the Saint-Simonian doctrine, this paper aims to make a definitive assessment as to whether this connection between capability and *capacité* is justified. We shall argue that the links between Saint-Simonian ability and Sen's (or Nussbaum's) capability is more a source of confusion than of enlightenment. Conversely, the disentanglement of these two concepts provides new insights on both approaches of justice.

For clarity, we henceforth refer to them as the *ability* and the *capability* approaches respectively. The structure of this paper is as follows. Section 2 provides the basic elements of the relevant definitions and seeks to characterise abilities and capabilities. Section 3 sets out a contrast between the ability approach, meant as a theory about the system of production, and the capability approach, which concerns the sphere of consumption. This allows us to

associate the Saint-Simonian reform project with the value of efficiency, while the capability approach is seen as intended primarily to value agency. Section 4 scrutinises the status of needs in both approaches, providing some insights into the role of merit. Section 5 concludes on the stakes of disentangling the two approaches.

2. Definitional elements of capability and ability

The Saint-Simonians are followers of Henri de Saint-Simon (1760–1825), whose thought was concerned with social justice and an understanding of industrialisation based upon physiology and history.⁵ Saint-Simon’s aim was to improve the social fate of the *prolétaires*. Saint-Simon was one of the first theorists of the “social question”,⁶ which was really a set of questions concerning the condition of workers and, more broadly, those whom the Saint-Simonians after him would designate as “the largest and poorest class”,⁷ including the proletarians.⁸

⁵ Up until the publication of the *Doctrine de Saint-Simon*, Saint-Simonianism was a structured and homogeneous intellectual movement. During their phase of doctrinal development (from the death of Saint-Simon to the publication of the *Doctrine*), each Saint-Simonian brought his or her intellectual contribution according to his or her ability. For example, Philippe Buchez was interested in physiology, while Prosper Enfantin was interested in political economy. These differences in the approach to capacity contributed to the richness of Saint-Simonianism and should not be confused with a lack of homogeneity. We here assume, therefore, that Saint-Simonianism, concerning the particular subject of social justice, is a homogeneous and unified doctrine.

⁶ On this point the Saint-Simonians, and more particularly Enfantin, had already dealt with the “social question” in the newspaper *Le Globe* on March 21, 1831. This expression, used to designate the social and economic marginalization of some workers, became common thereafter, but only from the 1840s. On the theme of the social question, see Procacci (1993).

⁷ The notion of number is decisive among the Saint Simonians, not only with regard to Malthus’ population law or Sismondi’s fears, but with regard to the fact that throughout history, according to the Saint Simonians, the most numerous were the “exploited”, i.e. the slaves, then the serfs, and finally, in the time of the Saint Simonians, the proletarians.

⁸ The term “proletarian” is not trivial, in as much as it will constitute a decisive element of the lexical field of socialism and communism, in particular with regard to the other key concept, the “working class.” Saint-Simon is undoubtedly the first author to address himself directly to the workers: “À Messieurs les ouvriers” in *Du système industriel*, 2ème partie, November 1821 (Saint-Simon [1821] 2012: 2628–32). It should also be noted

Saint-Simon was a thinker of industry – industrialism – in the same way as the liberal thinkers Charles Comte, Charles Dunoyer and Jean-Baptiste Say.⁹ Nevertheless, his thinking gradually came to be at odds with the idea of the natural convergence of interest and economic competition, since his aim was to establish a hierarchy based upon abilities. Saint-Simon was indeed convinced that a just society would be one within which everyone could find their proper place, like the organs in a body. Indeed, based upon physiology, he focused on the progress of the human mind and of human institutions: in short, for him the mind follows a positive historical law of progress and increasing complexity. Saint-Simon and his followers – the Saint-Simonians, who came first from the *École Polytechnique* – then deemed that the final step of industrialisation would be achieved once everyone was able to express their physiological capacities within a fair system of production; where a system of production is fair if it takes into account individual features (abilities, vocation) and rewards those who are deserving according to their work.

At his death, then, his students comprised the primary circle of disciples recruited during Saint-Simon's lifetime, surrounded by a wider circle, among whom Prosper Enfantin and Saint-Amand Bazard were the most active and well known. With Rodrigues, Duvergier, Halévy, and at least for a time the successive secretaries of the master, Augustin Thierry and Auguste Comte, they founded the Saint-Simonian school in order to continue his work, and especially to apply his principles and propose an alternative to the system of competition and its resulting injustices. The school was active mainly between 1825 and 1832. The ultimate goal of Saint-Simonianism is that everyone improves their social conditions; thus, a society in which an individual cannot improve her social condition is unjust. The Saint-Simonian concept of ability is enshrined in their concern for social justice, as stated in the *Doctrine*, a document common to all the Saint-Simonians. At root, they held that the organisation of the whole of society – all social institutions – ultimately derives from individual abilities. Their thought is based upon two elements: opportunity and fair rewards.

Firstly, the basis for such a theory can be found in the Saint-Simonian focus on opportunities. The social good, as the object of justice, is opportunity, i.e., the fair allocation of opportunities to everyone in order to improve their social lot. Opportunity refers only to

that there is no distinction between land workers and factory workers among Saint-Simonians. Only the criterion of work as a creator of value counts.

⁹ There are several streams within French liberal thought. For example, Jean-Baptiste Say represents a republican liberalism. On this reading, see Forget (1999) and Whatmore (2000). On industrialism, see Faccarello and Steiner (2008), Hart (1994) and Steiner (2006).

access to the means of production (see *DSS*: 69, 83, 92). Any connection with the modern concept of “life opportunities” – regarding gender, diversity, race, and age – would be hard to defend. Access is thus based upon individual abilities. Saint-Simonianism deals with equal treatment inasmuch as everyone is entitled to access the means of production *according* to their ability; but the amount of the means of production entitled to each worker varies with their individual abilities, following this rule of justice: “to each according to his abilities”. The division of the means of production should suit the particular sets of skills and knowledge pertaining to each individual. In this respect, a just allocation is based more upon fairness than on strict equality. Unequal entitlements emerge from this fair access to opportunities: someone with a lower ability would access a smaller amount of the means of production. Thus Saint-Simonianism can be seen as a particular contribution within the field of social justice based upon fairness.

Saint-Simonianism is a stream of thought that can be connected to current works on distributive justice. Recently developed, the modern idea of distributive justice – social justice – considers everyone as entitled to social goods without exception (Barry 2005, Fleischacker 2004). This entails that social goods encompass wealth but also assistance, primary goods and opportunities. In these theories of distributive justice, criteria such as merit, honour, and social status disappear in favour of the satisfaction of needs. The Saint-Simonians were amongst the first to set out the main lines of a coherent vision of the satisfaction of needs. In order to do so, they base all their social considerations upon secular merit: everyone deserves to have access to the means of production. This will improve their social fate and, above all, the satisfaction of needs. The date of appearance of these new considerations is unclear, but is generally estimated to have been close to the beginning of the nineteenth century.

Secondly, the Saint-Simonian doctrine aims to provide for fair reward based upon work. From redistribution according to physical, moral, and intellectual abilities, each individual has to contribute socially – fulfil a specific task – as do the organs within a body. Indeed, since each individual is a part of a whole, such a fair system needs everyone to be involved in order to ensure its functioning. This is why one may argue that each individual *must* express this set by providing a certain amount of output. In other words, all workers have to provide effort. This is the foundation of what one may call a social duty. The shape of the economic organisation adopted by the Saint-Simonians enables the attribution to each worker of an individualised reward based upon work. First, ability shapes the amount of input. Then, merit and reward are based upon effort. This sheds light on a new conception of

merit: merit is secular, and is restricted to the productive sphere by opposition to the previous historical forms of merit based upon religion and social status. Any notion of privilege is then rejected: account is only taken of social contribution. Notions of charity or social aid from religious institutions is excluded as well. In other words, modern distributive justice – social justice – deals with the focus on entitlement rather than benevolence; it relies more on institutions such as the State than on the Church.

Ability thus refers to a set of physical, moral, and intellectual skills and knowledge that everyone is not only *entitled* to express (and acquire), but also *must* express. This link between capacities – namely the human body – and social organisation has its roots in physiology: this is unsurprising, perhaps, since many Saint-Simonians were physicians (Bichat, Buchez, Peisse) or were deeply influenced by physiology (Cabanis).¹⁰ The Saint-Simonian concept of ability is then based upon a specific assessment: an individual represents a specific set of physical but also intellectual competences, and therefore each individual is physiologically different from every other. It is thus essential to note that the concept of ability not only refers to physical skills but also to education and intellectual training.

Society as a social body is organised around the concept of ability, with, again, the members of society seen as ‘organs’ fulfilling a specific task. By fair transfers of means of production, the ‘body’ enables everyone to find their proper place and improve their social conditions. These physiological differences open the way to a plethora of abilities which are then developed by education or work. Individuals are not born equal in aptitude. The link to

¹⁰ François-Xavier Bichat (1771–1802) was a physician and a major figure in the vitalist movement. See his four volumes of *Anatomie générale appliquée à la physiologie et à la médecine* (1801).

Philippe Buchez (1796–1865) was also a physician and a French politician. In several articles entitled published in *Le Producteur* in 1826, Buchez linked physiology to industry and, above all, explained how physiology deals with the preservation of society.

Louis Peisse (1803–1880), elected to the Académie des médecins in 1866 although not a physician, was another of the Saint-Simonians in charge of informing them about medical advances, particularly the debates between the vitalist school of Montpellier and the organicist school of Paris. He is the author of a *Notice historique et philosophique sur la vie, les travaux et les doctrines de Cabanis* (1844) and translated works by Stewart (*Éléments de la philosophie de l'esprit humain*, 3 volumes, 1843–45) and JS Mill (*Système de la logique déductive et inductive*, 2 vols. 1866).

Cabanis (1757–1808) was a French physician, physiologist and politician, author of *Rapports du physique et du morale de l'homme*. Cabanis was a major figure of the French ideology, a stream of thought arguing for a true science of ideas.

social or physiological inequalities is specific because – within the Saint-Simonian doctrine – society does not produce *a priori* inequalities.

In summary, the Saint-Simonian school of thought regards society as a social body; and it is within society that everyone is able to express their ability in order to satisfy their needs. The means of production – the only means through which social justice can be reached – must be transferred according to competences, not privilege and heredity. In the context of the Saint-Simonian doctrine, developed in the early nineteenth century, an ability is seen as a property of individuals, linked to the expression of their physical, mental, and intellectual abilities.

The modern concept of ‘capability’ was born much later. The concept of basic capability appeared in Sen’s famous Tanner lectures entitled “Equality of what?” (Sen [1979] 1980), from which a capability approach emerged (Sen 1985a) that went on to claim considerable autonomy from its author (Baujard & Gilardone 2017).

Capability here is a ‘material’, i.e., an information basis for justice, which describes the situation of a given individual in a certain way. This specific description is meant to be used for collective evaluation or decisions in the context of the assessment of social welfare, because it is able to capture certain features which are important for a given conception of justice.

Sen framed his idea of capability in reaction against utilitarian theories (see notably Sen 1979a,b). In this view, the focus on utility in welfarist theories is problematic because it downplays other important values such as freedom; furthermore, subjective well-being does not properly represent the agent’s actual well-being when individuals have adaptive preferences, especially in cases where agents become resigned to their circumstances. Sen also wished to depart from the Rawlsian focus on primary goods,¹¹ in which he discerned “an element of fetishism” of such goods. What is important, rather, are the “advantages derived from the relationship between persons and goods” (Sen [1979] 1980: 216). Hence Sen

¹¹ Sen’s focus on advantages also constitutes a view on the informational basis of justice which is alternative to the Rawlsian focus on primary goods (Sen 1980: 217). This informational issue was crucial in the emergence of the capability approach (Baujard and Gilardone 2017). Besides his alternative view on the informational basis, Sen also developed distinctive and substantial arguments against the Rawlsian theory of justice (Rawls 1971). These arguments concern the Rawlsian focus on “just institutions” rather than “just societies”, open vs. closed impartiality, and “transcendental” vs. “comparative” approaches to theories of justice (see e.g. Sen 2002, 2009, 2010). These arguments are matters of debate in the secondary literature (see, e.g. Kandil 2010, Valentini 2011, Davis 2012, Ege, Igersheim, Le Chapelain 2016). We thank a referee for raising this important issue.

proposed a focus on an objective yet normative account of welfare, seen as a list of what is actually important for agents, and which embeds the value of freedom. He then elaborates two related concepts: functionings and capability.

A *functioning* is defined as a list of certain ‘doings’ and ‘beings’ that an agent is able to attain thanks to her access to commodities, and that this agent has some reason to value (Sen 1985a, 1987). Hence, commodity bundles are not interesting *per se* but only insofar as they provide functionings. For instance, rather than the commodity ‘a car’, the agent would have reason to value the functions of transport, of the individual autonomy the car provides, and the symbol of identification linked to the particular kind of car. Sen (1985a) takes seriously the characteristics of agents in their ability to make use of the functions of the commodity. For instance, one function of a glass of milk is nutritional: among other things it provides calcium, but the access to the nutritional content of calcium is not by itself sufficient to be relevant for any person in particular. We need also to guarantee that the person is able to retrieve the nutritional content within the glass of milk: were she lactose intolerant, the access to a glass of milk would be nutritionally meaningless. For natural or cultural reasons, the transformation rate of commodities into functionings may be heterogeneous among agents. In case of heterogeneous ability to take advantage of a good, it is not enough to focus on the resources the agent may have access to, rather, it is relevant to focus on the actual advantages that the agent is able to get from these resources.

Even more than functionings, Sen suggests we should value capability when thinking about justice. Capabilities, in Sen’s terms, are a material for justice, and are defined as the list of functionings from which an agent who has access to certain commodity bundles may choose. For instance, a person who has access to both transport and education may make a significant choice between going to work in an office or staying home as a housewife. Without one of the functionings, she may have no other choice than to be a housewife. With both, becoming a housewife manifests a free and meaningful choice. Contrasting one list (transport, education) with an alternative list (transport, no education) is like choosing between different lifestyles, where significant choices may or may not be available. Hence valuing the choice among different functionings bundles – i.e. the focus on the person’s capability – captures a specific valuation of freedom. Capability is what Sen defends as valuable for social justice.

The lessons we may draw from the comparison between the two approaches are as follows. Firstly, ability and capability are linked via reflection on social justice. Ability is not only a criterion based upon physical competences, but also on the capacity to be or to do

according to what each person has produced. Capability, meanwhile, is embedded in twentieth-century thought about justice. It is defined as the relevant information for thinking about justice at the individual level: by valuing capability, we value what individuals may actually accomplish given their individual characteristics, as well as the freedom of choice between different accomplishments.

3. Production vs. consumption

The Saint-Simonian doctrine is based upon a concern with economic efficiency and rationalisation, since they aim to organise and administer the industrial system in order to provide enough goods, and above all enough opportunities, to satisfy social and individual needs (on this point, see Mason 1931). Indeed, as young polytechnicians, the Saint-Simonians were deeply convinced that increasing productivity thanks to industrial progress would decrease inequalities. Improving the industrial system and increasing its productivity would only be possible once that system had been organised. In the absence of a natural convergence of individual interests, they aimed to shape a system based upon an elite of the most able. Such a system would be based on the idea of obedience to ‘natural chiefs’, and it is concerned with the question of what tasks should be allocated to individuals according to their properties, rather than according to their willingness. Some commentators have highlighted the propensity towards hierarchy in the Saint-Simonian doctrine, as well as its authoritarian aspects (Manuel 1956, Soliani 2009). The whole system of the transfer of the means of production is shaped in order to provide enough final goods and opportunities, corresponding to a clear faith in industrial capacities. The Saint-Simonians do not focus on society seen first as a social body, but they have reasons to value the links between each ‘organ’. Workers – proletarians – are the essential elements of the system: they are the ones who make the social body function, not the idlers who, despite the fact that they own the means of production, do not contribute socially. This point of view had already been put forward by Saint-Simon in his famous parables *Querelle des abeilles et des frelons* and *Parabole de Saint-Simon* (see Saint-Simon [1819] 2012; [1819–20] 2012): industrial society is a living organism that needs to be fluid to function, and therefore does not need hornets, i.e. non-producers, only bees, i.e. workers, those who produce something instead of just

consuming and therefore destroying. Then, because they are the ultimate means of production, the focus on abilities ensures efficiency, and thus secures justice.

In this respect the Saint-Simonians do clearly focus on the production side. Production is a prerequisite to the satisfaction of needs. As shown above, their conception of social justice accentuates the access to the means of production rather than the reward in itself: hence, rationalisation and organisation are the main features of this doctrine. The final goal of the Saint-Simonian project is to improve the social state of the workers; social emancipation can only be reached once a productive system guarantees access to the means of production.

The Saint-Simonians' focus on the means of production is linked to the fact that satisfaction of needs only occurs once individuals express their abilities, that is to say only after they have fulfilled their social duty. The goal here is not to distribute final goods in order to satisfy needs, but to distribute opportunities to satisfy these needs. In other words, the goal is to enable everyone to access the means of production, rather to access outcomes, final goods, or assistance (excepting disabled individuals). This rationale lies at the basis of the Saint-Simonian focus on efficiency and rationalisation. It is also the ground of the Saint-Simonian focus on economic merit: efficiency and rationalisation open the way to merit since even though the satisfaction of needs is what they target, the most talented or skilled workers would be those most endowed with the means of production.

This is a source of concern, however, since the satisfaction of needs does not automatically follow on from rationalisation: how can we be sure that the satisfaction of needs does indeed occur with rationalisation? For one thing, only the most talented or skilled workers would be able to satisfy their needs; worse, what if Victor's needs are greater than Marjorie's even though she is more skilled than him? The Saint-Simonians do not say a word about such issues. They only argue that the more numerous the opportunities, the more efficient and just the state will be. In short, the means of production must be distributed according to individual ability. It follows, for the Saint-Simonians, that the consideration of individuals is reduced to a function of production.

Efficiency requires a perfect match between ability and means of production. Ability is supposed to be measurable and comparable. The task of an elite of directors and bankers is to measure ability, because they more than anyone else know how and to whom the means must be distributed. Saint-Simonianism is a production-oriented doctrine. More precisely, the aim is to distribute the means of production to individuals so that they can improve their social conditions. To this end, bankers are responsible for distributing these means of production. In this, Saint-Simonianism is a theory of the transfer of the means of production –

thus the means of improving one's living conditions – through bankers. The Saint-Simonians are known for their writings on the financial and banking system (Jacoud 2010), in particular the brothers Adolphe and Gustave d'Eichthal (Le Bret 2012) and the brothers Pereire (Autin 1983, Yonnet 1998). According to the Saint-Simonians, bank credit is an equitable means of access to the means of production: it is the only way to stop idleness by transferring the means of production from the hands of idlers to the hands of workers.

What is more, each individual's ability is innately different. Fairness takes these differences seriously, although not in order to compensate the less fortunate: it is more efficient to allocate a higher amount of means to the more able.

The Saint-Simonians wish to improve the social state of the most numerous class. Inequalities in ability are important: individuals with higher ability are also those who are likely produce more efficiently, and hence should be entitled to more access to production. Thus consideration of individuals is restricted to considerations of the production function.

Unlike the ability approach, none of the capability approaches are considered to apply to the sphere of production. Before proceeding, however, we need to acknowledge the diversity of the capability approaches on offer. After Sen introduced the capability approach, the concept asserted its autonomy from its putative creator, and was further elaborated by a range of other thinkers. "All capability theories focus on what a person is able to be and to do (her capabilities) and/or those capabilities that she has realised (her functionings)" (Robeyns 2016: 403). But while Sen refuses to defend a fixed and final list of capabilities (see e.g. Sen 2004), many authors have ended up narrowing the focus on capability to a focus on a given list of basic capabilities, or basic functionings, namely the list of actual doings or beings that a person may have reasons to value.

If the Saint-Simonian theory were consistent with a capability theory, we ought to find access to the means of production among the list of basic functionings. But to our knowledge no list of capabilities considers productive capacities among the basic functionings (e.g. Nussbaum 2000). There is an explanation for this: capability approaches are focused on aims rather than means, and on the good life or social justice rather than the sphere of production. In contrast, the Saint-Simonian ability approach is focused on determining the means to attain an efficient organisation of society.

One result of the Saint-Simonian focus on efficiency is that the respect for hierarchy and obedience trumps individual autonomy. The use of such means may conflict with individuals' own views; moreover, even if hierarchy and obedience are somehow thought to support individual interests, paternalism and cases of conflict with the respect for individual

autonomy are very likely. By contrast, Sen often defends the capability approach on the grounds of the essential importance of individual agency (Sen [1979] 1980, 1985b, 1993, 2006). Agency is always one of the values targeted in capability approaches. Because the capability approach intends to be sensitive primarily to agency, it is not elaborated by reference to the sphere of production, where individuals are contributors to the public good. It is rather thought to pertain to the spheres of consumption and flourishing, which are the means by which agents are likely to develop their doings and beings.

While the ability approach is meant to justify Saint-Simonian reforms, the capability approach is not straightforwardly reformist. Nussbaum defends the capability approach, saying that it should be “defined as an approach to comparative quality of life assessment and to theorizing about basic social justice” (Nussbaum 2011: 18). Accordingly, Robeyns distinguishes two kinds of capability approaches: one approach aims to assess “the change or design of institutions, policies, and practices” (Robeyns 2016: 403), while the other approach is a normative framework used to formulate reasoning on social justice.

On the one hand, some capabilitarian theories may be reformist, proposing ways to operationalise capability and implement capabilitarian policies. In this case they need to take a first step before operationalisation, which would be the generation of lists of basic capabilities, as presented above. Holding one list to be superior to alternatives is likely to face criticisms of paternalism (e.g. Deneulin 2002, Carter 2014). On the other hand, Sen’s version of the capability approach may be viewed as not primarily reformist. It has been argued that he originally introduced the idea of capability as a heuristic tool in order to critically assess existing theories of social justice (Baujard & Gilardone 2017). The elaboration of capability, in Sen’s version, becomes a step in an argument for the deficiency of welfarism and of resourcism – i.e. the exclusive focus on respectively utility and resources in measuring social welfare. Sen’s approach is primarily critical and theoretical rather than operational and reformist. Strikingly, Sen refuses to be operational exactly because of his respect for agency. His contribution to theoretical reasoning on normative issues is aimed to form a part of public debate. One possible and indirect consequence may well be a proposal for reforms, but the reforms would derive from public debate rather than capability reasoning as such. According to this view, the alternative approach, i.e. the aim to be primarily operational, and to serve the project of a reform, is likely to substitute for the autonomy of the person, and this is not desirable.

To wrap up the discussion so far, our review of issues to do with production versus consumption capture the opposition between the value of efficiency versus the value of

agency; however, valuing agency per se also requires that reforms may not be the primary aim of the approach. The Saint-Simonian ability approach seemingly justifies reform by reference to the criterion of efficiency, which consists in promoting production by allocating more means of production to the most talented and skilled workers. The defence of hierarchy and obedience for the sake of efficiency may well conflict with the respect for agency. Capability approaches on the contrary pertain to the domains of consumption and flourishing, where what is at stake are doings and beings that are valuable for persons. Among the authors who advocate capability approaches, those who lay more emphasis on respect for agency are not primarily reformist; they aim to participate in public debate, which may in turn result in reforms.

4. Secular merit vs. needs

Many economists have sought to understand how evils such as impoverishment and economic crisis can occur. Say ([1803] 2006), for instance, framed an explanatory model based upon lack of outlets; Ricardo (([1817] 1975)) was concerned with fluctuations of corn prices; while Sismondi ([1827] 1991) pointed the finger at overproduction. At the same time, another strand of thought sought to connect considerations of social justice with matters of economics. This is the foundation of the social question, a wide intellectual and social movement whose goal was to improve the social conditions of workers. Popularised in inquiries by Villermé (1840) and Engels (1845), this movement was rooted in the desire to provide alternatives to economic competition. Pursuing this aim, many thinkers argued in favour of economic egalitarianism and communal ownership in order to satisfy needs, maintaining at the same time that the instability which flows from unbridled competition renders such a system incapable of providing subsistence for all. This would pave the way to the emergence of ideas of social justice.

According to Barry, “The modern concept of social justice emerged out of the throes of early industrialization in France and Britain in the 1840s. The potentially revolutionary idea underlying the concept of social justice was that the justice of a society’s institutions could be challenged not merely at the margins but at the core” (Barry 2005: 5). To this end, the socialistes fraternitaires Blanc (1839, 1841) and Pecqueur (1842) framed an egalitarian answer to the social question, describing alternative systems of production that favour the

goal of satisfaction of needs over economic efficiency (Frobert 2014). The issue was to find a way to link economic activity with the satisfaction of needs, instead of dealing first with competition and then effecting an *ex post* redistribution of final goods to those who had ‘lost’ the game of individual interests. Louis Blanc was the most famous exponent of this philosophy, and opened the way to a distinctive strand of social thought. His thought was based on the criterion of need and prefigured the famous communist formula. Widely commented upon in political philosophy (particularly in Miller 1999: 212–231), this criterion refers to a general – and above all modern – consideration that everyone must be in a position to improve their living conditions without restriction:

In its Aristotelian sense, however, ‘distributive justice’ called for deserving people to be rewarded in accordance with their merits, was seen as bearing primarily on the distribution of political status, and was not seen as relevant at all to property rights [...] Above all, the ancient principle has to do with distribution according to merit while the modern principle demands a distribution *independent of* merit. *Everyone* is supposed to deserve certain goods regardless of merit on the modern view; merit making is not supposed to begin until some basic goods (housing, health care, education) have been distributed to everyone. (Fleischacker 2004: 5)

Judged according to this dichotomy, the Saint-Simonian thought does not seem quite so modern since it refers to a form of merit. Indeed, the Saint-Simonian rule of remuneration – “à chacun selon ses œuvres [works]” – does not refer to needs. Nevertheless, the Saint-Simonians argued in favour of a system that aims at satisfying needs even though they use merit (works) as a means to reach this aim. The criterion of merit is grounded in the Saint-Simonians’ theory of labour value: only workers, those who produce something, deserve to see their social conditions improve and thus their needs met. Merit comes before need. Industrial production is the expression of this merit. Merit is therefore secular.¹²

Industry – the improvement of production structures in all sectors – is the best way to improve social conditions. In this respect, the Saint-Simonians adopt the framework of industrialist theories, something which explains the strong relations between Saint-Simon and the industrialist authors Charles Comte, Charles Dunoyer and Jean-Baptiste Say, notably through their joint collaboration in the newspaper *Le Censeur*. According to Saint-Simon,

¹² It is worth noting that Saint-Simon was a Count, but publicly renounced his title.

industry refers to the ability to produce things of material value (Saint-Simon [1823] 2012: 2836). This is no different from the views of his colleagues in *Le Censeur*. Regarding competition itself, Saint-Simon accepted emulation between worthy individuals (see for instance Saint-Simon [1819] 2012: 1864–65). However such emulation should take place within a hierarchical system. This explains the major difference between Saint-Simon and the liberal thinkers.

Although Saint-Simonian industrialism differs from Say's liberalism, their common effort to accentuate the industrial character of the French productive structure makes them the leading thinkers of this movement.¹³ In its Saint-Simonian sense, 'industry' connotes not only productive structures or economic progress as attained through machines, but also reformist views aiming at shaping economic, social and political life through a hierarchy of abilities. More precisely, Saint-Simonian industrialism is part of a particular context shaped by the upheavals that followed the French Revolution.

The abolition of privileges must be linked to the desire of the Saint-Simonians to establish a society based no longer on titles and nobility but on the recognition of the merit of each person as an expression of these abilities. The merit is therefore secular and economic. By establishing individual property, the Declaration of the Rights of Man and of the Citizen (1789) organized society into two levels: a private sphere where each citizen has a right to a minimum of liberty, and a public arena that makes the French Republic one and indivisible. The weights and measures standardization (1790), the Code du Commerce (1807), the Le Chapelier law (1791), and new forms of economic activity (workshops, patents), strongly favoured French economic development and industrialization by designing a homogenous market.

Considerations of economic competition as well as commercial crises guided the Saint-Simonians' proposals to counteract such harmful effects in favour of a controlled and fluid organization of production and the allocation of the means of production. Advances in medicine, and more precisely the advent of a new form of knowledge – physiology – are undoubtedly the most representative of the Saint-Simonian industrialist approach. A social organisation project such as the Saint-Simonians' must have a solid theoretical basis: the

¹³ This explains why Saint-Simonians share with liberal industrialists the same views on commercial crises: while part of French social thought, led by Sismondi (1827), analysed these crises as a phenomenon of underconsumption, the Saint-Simonians and Jean-Baptiste Say considered on the contrary that France should improve its production infrastructures and the skills of its producers in order to produce more and better.

criterion of organisation would therefore be physiological differences rather than the social differences inherited from feudalism.

The Saint-Simonian project for an industrialized and fluid society is based on the replacement of feudal privileges by the recognition of individual talents. This idea of fluidity is linked not only to production structures, but more generally to the idea that an economic system should be capable of supporting all workers. This would be a fluid system where everyone would have a task to perform, where production would be organized, and where each production channel would be supplied. This model is not inspired simply by the Smithian division of labour as it applies to society as a whole: the reference point here remains physiology, which constantly inspired the Saint-Simonians on the basis of their work in medicine. From then on, like Jean-Baptiste Say, the Saint-Simonians saw society as an organized social body; unlike Jean-Baptiste Say, however, the Saint-Simonians integrated the field of social justice into their system for a just society. The Saint-Simonian project is therefore reformist and based on a philosophy of progress with a clear desire to introduce a new criterion of justice: merit from industrial production.

According to the Saint-Simonians, only a rationalised system of production that spans the whole of society would be able to provide everyone with enough to satisfy their needs (Mason 1931). A fair system of remuneration which gives merit its just reward is likely to increase overall production. Hence, enhanced production is more able to raise levels of remuneration and so meet the needs of individuals. Such a view differs from the capability approach on several levels.

The first is discrimination, which is related to reward since one may argue that by its focus on ‘works’, Saint-Simonian considerations of social justice clearly discriminate between people. The most able people would be the most endowed with means of production and consequently the most rewarded. What about the less able?

The first thing to observe is that the Saint-Simonians are among the first thinkers to argue that everyone deserves their needs to be met. Nevertheless, the Saint-Simonian system is based upon merit as a means to a specific goal, which is the satisfaction of needs. In so far as their major concern is efficient production, the Saint-Simonians do not deal with final goods. Efficiency remains the ultimate focus for the Saint-Simonians, because needs cannot be met except by rewarding merit through an efficient system of production. Indeed, faced with economic evils such as poverty and crisis, the Saint-Simonian answer is to end economic competition between individuals and to organise production in order to ensure that no one is unable to work and thus satisfy her needs. It follows from this that there should be

an inequality of rewards based upon works in order to support economic activity and efficiency; this is the core of their considerations of social justice.

Merit is the basis of the Saint-Simonian system, which aims to satisfy needs. The Saint-Simonian goal being the “improvement of the physical, moral and intellectual lot of the most numerous and poorest class” – as expressed in the subheading of their third journal, *Le Globe* – they focus on physiological needs. In other words, they were convinced it would be just – indeed, fair – to reward according to work, since workers had long been deprived of the means of production and the associated reward. It is worth highlighting that they only consider able members, such that Saint-Simonianism does discriminate against disabled people.

Other social thinkers of the period – including Blanc (1839, 1841), Cabet (1840, 1846), Pecqueur (1842), and Vidal (1846) – also reflected on the idea of a right to work, but foundered on the question of whether the final object of social justice was merit or need. In opposition to the Saint-Simonians, views about fair reward based upon work (i.e. secular merit since, unlike Blanc, the Saint-Simonians did not refer to God on this point) were rejected by all these social thinkers. Besides a concern for disabled people, the other argument from the defenders of need made reference to the rule of remuneration: given that works are a central focus, a further issue then arises regarding the reward for those works. The Saint-Simonian focus on works does not adjudicate between different rules of reward: whether or not reward concerns marginal productivity, whether it responds to time and pain. The Saint-Simonians never clarified this crucial point.

The second issue lies in the fact that all individuals have to give something (to express their abilities) *before* having their needs met. This condition contrasts with the capability approach, where agents do not have to produce anything to be entitled to some other thing; their status as human is the sole condition for the legitimacy of their claims. For the Saint-Simonians, the only exception to this conditional entitlement concerns access to the means of production: this access comes before and not after the individual contribution to the social good. Since the needs of the poor should be met, everyone should be able to access the means to improve their social condition. For the Saint-Simonians, these means are those of production. Indeed, everyone is entitled to access the means of production, since this is the core of the exploitation which the Saint-Simonians aim to end (*DSS*):

We say that in the future the only right to property will be the ability to do peaceful work; the only title to consideration, work. To express ourselves more precisely, we

shall add here that this title must be given to each owner specifically, which implicitly comprehends another idea, namely that the only right transferred by the owner's title is the direction, use, and exploitation of property.

If, as we have proclaimed, mankind moves toward a state in which all individuals will be classed according to their ability and rewarded according to their work, it is evident that property, as it exists now, must be abolished; for in giving a certain class of men the right to live in complete idleness from the work of others, property supports the exploitation of one part of the population, namely the most useful one which works and produces, for the profit of those who know only to destroy. (*DSS*: 93)

An alternative view of fairness would be to value the improvement of the social conditions of the less able. Capability approaches are more likely to belong to this alternative view. They contrast sharply with the Saint-Simonian focus on works, and with the fact that Saint-Simonian value efficiency rather than agency or equality.

Capability approaches do not value objective needs, nor do they value subjective well-being *per se*. They stand somewhere in the middle, adopting the view that actual individual and social conditions may interfere with a persons' ability to accomplish certain goals. Persons aim to accomplish certain functionings, doings, and beings that they have reasons to value. Some operational versions of the capability approach focus on actual basic functionings to which agents have access. To some extent, this corresponds to certain well-identified needs, that we can display in a list of basic capabilities, with a few reservations. They are a means for the accomplishment of a valuable life, rather than ends in themselves. They are not objective needs but normative elements.

We have seen above that the Saint-Simonians consider heterogeneity in abilities as an essential ingredient of the actual computing of individual capability. As Sen puts it in describing his own capability approach, there is heterogeneity in the transformation rates of the commodity into valuable functionings, depending on a variety of factors including physiological, social, and cultural conditions (Sen 1985a: 17–18). This implies that, *ex ante*, the same measure cannot be applied to distinct persons when they are differently able. For instance, the means needed for a physically handicapped person to have a job are different from those for a person in good health: besides education or a transport system, which are necessary for both, the handicapped person will require e.g. that rights to disabled access to transport and buildings are enforced. In the case of gender discrimination and/or adaption

issues, what should be available for a woman will be distinct from that for a man (e.g. Nussbaum 2001). This explains why different studies are conducted for different targets, such as indigenous people, women in underdeveloped countries, youth or the elderly. Meeting basic needs is not the ultimate goal of the capability approach, although considering the heterogeneity of needs of different persons is necessary to reach the goal of improving their capability.

Merit is not the aim of the capability approach either; however, it would be naïve to associate the capability approach with a mere focus on individual accomplishment. Agents are still expected to contribute to the social good. Not only is the sense of responsibility a main concern of Sen's idea of justice (Sen 2008, 2009), but Gilardone (2016) also recalls the importance of the link between individual responsibility, power, and obligation. For a person intertwined in an interrelated and contingent world, valuing capability is also a way to highlight the importance of her ability to meet her obligations.

As a result, the capability approach considers all agents for what they are, and values what they have reasons to value and could attain depending on their own abilities. What agents can attain is what is called capability. For the Saint-Simonians the characteristic individual transformation of commodities into capabilities is what would be called ability (or 'capacity', translating *capacité*). In contrast, the ability approach values agents for their contribution to production, given that their contribution depends on their unequal abilities.

5. Conclusion

The differences between the concepts of capability and capacity are manifest at many levels. First, a capability is an evaluative space for justice, defining what individuals value in the material world, while an ability is a property of individuals. The former may be defined essentially in the domain of consumption, while the latter is clearly seen as a contribution to production. Second, capabilities are of primary importance for the capability approach; the Saint-Simonian, by contrast, argues that production in the end is what is important. Third, these differences reveal a contrast in the values on which the theories focus: the ability approach insists on efficiency, while the capability approach focuses on agency. Fourth, these differences derive from their contexts of emergence: the Saint-Simonians were born into the project of historical progress and reform, while the capability approach was developed in the

context of modern theories of justice, with Sen shaping the debate through the prism of material and seeking alternative approaches in the study of development.

Even in considering the evolution of the capability approach from Sen's theoretical contribution to the more constructive version by Nussbaum, a core difference persists: capability theories value individual well-being, resulting in a focus on agents and their consumption, while Saint-Simonian theories value production, to which individuals contribute. Hence, rather than valuing the satisfaction of needs, the Saint-Simonians assign more importance to rewarding individual merit. We hope this paper has been able to rebut attempts to draw simple analogies between the Saint-Simonian and the capability approaches. If we should seek an analogy with more potential for enlightenment than that between capacity and capability, we would do better to examine the similarities between the Saint-Simonian approach and recent theories of responsibility and equity (e.g. Fleurbaey 2008, Fleurbaey and Maniquet 2012).

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