

CURRICULUM VITAE

PETER JAMES LAMBERT

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1. Personal

Year of birth: 1946
Nationality: UK and US dual citizenship
Marital status: Married with two children and three step-children
Present appointment: Full Professor of Economics, University of Oregon, USA
(half time appointment from September 2005; indefinite
tenure awarded December 2005).

2. Higher Education

First degree: B. Sc. (Hons.) in Mathematics, Manchester, First Class, 1968
Further degrees: Diploma in Advanced Mathematics, Oxford, 1969
D. Phil. in Mathematics, Oxford, 1971. Thesis: *Simple Groups and
their Character Tables*
M. Sc. in Economics and Econometrics, York, 1977

3. Career

(a) Previous appointments:

1970-71 Lecturer in Pure Mathematics, Wadham College, Oxford UK
Duties: tutoring undergraduates.
1971-76 Lecturer in Pure Mathematics, University of Ibadan, Nigeria
Duties: 3rd year undergraduate lecture courses in algebra; 1st year service
courses for economists; setting up Mathematics Department at new Jos
Campus (now University of Jos).
1976-77 Inter-University Council Fellow, Department of Economics and Related
Studies, University of York, UK
1977-78 Lecturer in Economics, University of Hull, UK
Duties: 3rd year undergraduate course in Optimization Theory; 1st year
Mathematics for Economists course; tutorials.
1979-90 Lecturer in Economics, University of York, UK

(a) Previous appointments, continued

- 1990-92 Senior Lecturer in Economics, University of York
1992-94 Reader in Economics, University of York
1994-2003 Professor of Economics, University of York, UK
See ahead for principal duties and activities whilst at the University of York.
2004-2005 Visiting Professor, University of Oregon, USA

(b) Other professional activities and distinctions:

- 1980-now Book proposals reviewed for: Blackwell, Cambridge Univ. Press, Oxford Univ. Press, McGraw Hill, Routledge, Simon & Schuster, Springer. Projects assessed for: Economic & Social Research Council, Australian Research Council, Israel Science Foundation, Social Sciences & Humanities Research Council of Canada, Flemish Research Council (FWO).
Articles refereed for New Zealand Treasury and the following journals:
American Economic Review, Annales d'Economie et de Statistique, Applied Economics, Australian Economic Review, Bulletin of Economic Research, Eastern Economic Journal, Economica, Economic Journal, Economic Record, Economics Bulletin, Economics Letters, Economics of Planning, European Economic Review, European Journal of Political Economy, Finanzarchiv, Fiscal Studies, Health Care Management Science, Health Economics, International Economic Review, International Review of Applied Economics, International Tax & Public Finance, Journal of Econometrics, Journal of Economic Geography, Journal of Economic Inequality, Journal of Economic Studies, Journal of Economic Theory, Journal of Health Economics, Journal of Income Distribution, Journal of Population Economics, Journal of Public Economics, Journal of Public Economic Theory, Manchester School, National Tax Journal, Oxford Economic Papers, Public Finance, Public Finance Review, Research on Economic Inequality, Review of Development Economics, Review of Economic Studies, Review of Economics & Statistics, Review of Income & Wealth, Scandinavian Journal of Economics, Scottish Journal of Political Economy, Social Science Quarterly, Social Choice & Welfare, Theory & Decision, World Development.
- 1980 Visiting Lectureship at Lehigh University, Bethlehem, Pa., U.S.A.
- 1984 E.S.R.C. grant awarded for project: *Analysis of U.K. Income Tax*, undertaken at Institute for Fiscal Studies, London.
- 1984- Research Associate at Institute for Fiscal Studies, London
Duties: advising and contributing generally to Personal Sector Research Programme; jointly supervising research work, see 4(c) below. Organized *International Workshop on Tax Progressivity*, 1985.

(b) Other professional activities and distinctions, *continued*:

- 1984-91 Joint Managing Editor of *Bulletin of Economic Research*
I edited the *Bulletin* jointly, first with Professor J.D. Hey and then with Professor J.P. Hutton, but from my office. It is an international journal. Referees are chosen, and advice given to prospective authors, across the whole spectrum of economics research. Innovations during my editorship include: commissioned survey articles and composite book reviews from recognized experts; one-week editor-only refereeing facility for short notes. I dealt with all copyright, copy-editing, production and financial matters.
- 1987 Reported on doctorat d'Etat, *Taxation des Revenus, Inégalité et Bien-être Social*, by Patrick Moyes, for the University of Bordeaux.
- 1988 Visiting Professor, University of Yaoundé, Cameroon and Institute of Public Finance, University of Naples. I gave 2-week seminar courses on the distribution and redistribution of income to postgraduates and staff in each place.
- 1989 External Examiner for D. Phil. thesis, *The Redistributive Effect of Progressive Taxation*, by Ian Preston, at the University of Oxford.
- 1989-90 Invited speaker at the Luxemburg Income Study Summer Workshop, an annual international gathering of postgraduate students. My topic was the distribution and redistribution of income.
- 1990 Appointed as an Editor of the journal *Social Choice and Welfare*. Elected to membership of the International Institute of Public Finance.
- 1990 Visiting Professor at the Delhi School of Economics and Visiting Fellow at the National Institute of Public Finance and Policy, New Delhi. I lectured to final-year M.Sc. students of Public Economics at the Delhi School, and held research workshops at the NIPFP. I was awarded a British Council Travel Grant in order to take up these appointments.
- 1990-94 Advisory Editor of the journal *Public Finance/Finances Publiques*.
- 1991 Visiting Professor of Economics at the Hebrew University of Jerusalem. I gave a 3-week course of lectures and seminars to postgraduate students and staff on the distribution and redistribution of income.

(b) Other professional activities and distinctions, *continued*:

- 1992 External Examiner for Ph.D. thesis, *Some Aspects of Personal Income Taxation with Special Reference to India* by Pawan K. Aggarwal, at the Delhi School of Economics, and for Ph.D. thesis, *Approaches to the Measurement of Income Inequality* by Yoram Amiel, at the Hebrew University of Jerusalem.
- 1992 Visiting Professor at Universities of Guelph and Western Ontario. This was a joint appointment for research consultation purposes.
- 1992 Academic Visitor for two months in the Department of Economics at the University of Melbourne. I liaised with staff there on research topics of mutual interest and give a course of lectures and seminars to fourth-year students on the distribution and redistribution of income.
- 1993 External Examiner for Ph.D. thesis, *On the Analysis of Tax Reform: A Microsimulation Tax Benefit Model for Greece*, by Harry Papapanagos, at the University of Essex.
- 1994 Visiting Professor, Swedish School of Economics and Business Administration, Helsinki. I collaborated in research and gave a 2-week lecture course on the distribution and redistribution of income to staff and students.
- 1994 External Examiner of thesis for Doctorat en Science Économique, *Distribution Equitable et Bien-Être Social: Approches Théorique et Empirique sur Données Individuelles de la Corée di Sud*, by Geneuhc Kim, for the Université de Paris I - Panthéon - Sorbonne. External Examiner of Ph.D. thesis, *Poverty, Inequality and Social Welfare in Australia*, by David Johnson, for the University of Melbourne.
- 1994 Awarded First Prize (jointly with S. P. Jenkins) in the John W. Kendrick Awards given by the International Association for Research in Income and Wealth for outstanding contributions to *Review of Income and Wealth* in 1993 (see journal article number 41 ahead).
- 1994-99 Member of the Editorial Board of *The Review of Income and Wealth*.
- 1995 Visiting Scholar in the Tax Policy Division, Fiscal Affairs Department, International Monetary Fund. A 3-month assignment to pursue research into measurement issues arising in the comparison of income tax systems.

(b) Other professional activities and distinctions, *continued*:

- 1995-96 Associated Contractor in E.C. Human Capital and Mobility (Networks) Project entitled "The distribution and redistribution of income". Contract n° CHRX-CT94-0647 between Commission of the European Communities and C.N.R.S. Paris. Allocated 5,592 ECUs to support joint research with other participants in the United Kingdom, Spain, Germany, Belgium and France.
- 1996 Guest Editor (jointly with J. Creedy) of a special issue of *The Journal of Income Distribution* (vol. 6, no. 1), devoted to a Symposium on Models and Functional Forms of Income Distribution.
- 1997 Appointed as external expert on the committee established by Statistics Norway to evaluate Rolf Aaberge's application for promotion to the grade of "senior research fellow (professor equivalent)"
- 1998 External Examiner for Ph.D. thesis, *Application of Fuzzy Set Theory to Poverty Analysis*, by Hossein Raghfar, at the University of Essex.
- 1998 Visiting Professor at Center for Economic Studies, University of Munich, and University of Bari. I gave a lecture course on taxation and the distribution of income to staff and students in each place.
- 1999 Visiting Professor in the Faculty of Economics and Applied Economics, University of Leuven. I gave a sequence of lectures in the MSc course *Advanced Public Economics I*.
- 1999 Appointed External Advisor for their new Chair of Economics by the University of Liverpool. I assessed the strengths, weaknesses and suitabilities of 13 candidates for this Chair, and made recommendations to the University regarding the drawing-up of a shortlist.
- 1999 Appointed Research Fellow of the CESifo Research Network at the Center for Economic Studies, University of Munich.
- 1999 Appointed to the Scientific Committee of the Swiss National Science Foundation's research programme "Problèmes de l'Etat Social"
- 2001 Became an invited member of the Editorial Board of the *Journal of Economic Inequality*.

(b) Other professional activities and distinctions, *continued*:

- 2001 Shortlisted (jointly with J.-Y. Duclos) for the Harry Johnson Prize, awarded annually by the Canadian Economic Association for the most outstanding contribution to *The Canadian Journal of Economics* (see journal article number 61 ahead).
- 2001 Visiting Professor (Profesor Catedratico) in the Department of Economics and Business of the University of Balearic Islands (Universitat de les Illes Balears), Palma de Mallorca, Spain. During my stay I delivered a sequence of lectures and ran two Workshops at the *First Mediterranean Summer School in Theoretical and Applied Economics*, attended by over 30 participating young researchers/academics and research students, which took place over a one-week period and focussed on the analysis of fiscal reforms and their effects on equity and economic efficiency.
- 2002 Visiting Professor, University of Bari, Italy. During my stay I made two presentations on redistributive taxation and equity to postgraduate students attending the *1st Bari Summer School of Economics: Advances in Economic Theory*.
- 2003 Visiting Professor, University of Oregon, Eugene, Oregon USA for 6 months. During this sabbatical period, *inter alia* I gave lectures on the distribution and redistribution of income to students of the PhD and MA programmes, and ran a PhD seminar in microeconomics, focusing on welfare and social choice.
- 2004 Visiting Professor, Department of Public Economics, University of Barcelona. The purpose of this visit was to give one week of daily seminar presentations on the distribution and redistribution of income to postgraduate students and staff.
- 2005 External Examiner of Ph.D. thesis, *Modelling Indirect and Direct Tax Reforms in Australia*, by Rosanna Scutella, for the University of Melbourne.
- 2005 Appointed member of the Scientific Committee for the *First Meeting of the Society for the Study of Economic Inequality (ECINEQ)* in Palma, Majorca.
- 2005 Invited speaker at a *Summer School in Public Economics* for young professors of economics in public finance from Spanish Universities, held at the Andrew Young School of Policy Studies, Georgia State University.

(b) Other professional activities and distinctions, *continued*:

- 2005 Appointed Editor of the new "Rediscovered Classics" section in *The Journal of Economic Inequality*.
- 2005 Invited speaker at conference "*Federalismo, Equità, Sviluppo*" (*Federalism, Equity and Development*), organized by the Ministero dell'Economia e delle Finanze, Rome, for the administrative, business and professional communities.
- 2006 Invited by the Institute of Public Finance, Zagreb, to participate as a foreign researcher in the scientific project *Convergence or Divergence in Social Policy: Comparison of EU and Croatia*.
- 2006-7 Guest Editor of *Research on Economic Inequality*, volume 15, devoted to issues of equity. This is a research annual, published by Elsevier.
- 2007 Visiting Professor in the Department of Economics at the University of Otago, New Zealand. I taught Part I of the course ECON 429, *Topics in Microeconomics*, to 4th year students, on the measurement of inequality, social welfare, poverty and redistribution.
- 2007 Invited speaker at a conference, *Social Ethics And Normative Economics*, in honour of Professor Serge-Christophe Kolm, in Caen, France. I also interviewed Professor Kolm in Paris. It is planned that the interview will be published in the journal *Social Choice and Welfare*.
- 2007 Gave one of the two invited plenary session lectures at the *Second Meeting of the Society for the Study of Economic Inequality (ECINEQ)* in Berlin.
- 2008 Funding granted by the Research Council of Norway for project, *Cross-national comparisons of redistributive effects: tax progressivity in Norway in an international perspective*, jointly with Thor Thoresen and Runa Nesbakken of Statistics Norway.
- 2008 Awarded a 2-year appointment as part-time Professor in the Unit for Taxation, Distribution, and Consumer Behaviour within the Research Department at Statistics Norway.
- 2008 I gave the invited lecture at the *International Conference on Welfare State Performance and Design* at the Institute of Public Finance, Zagreb, Croatia.

(b) Other professional activities and distinctions, continued:

- 2008 Invited lecturer at Oslo Summer School in Comparative Social Science Studies, Faculty of Social Science, University of Oslo, Norway
- 2008 Appointed by the Senate of the Faculty of Economics at the University of Ljubljana, Slovenia, to the Assessment Committee for the doctoral dissertation entitled *Redistributive effects of direct taxes and social benefits in Croatia* by Ivica Urban.
- 2009 Taught a course on the distribution and redistribution of income in the MA program at the International School of Economics at Tbilisi State University (ISET), Georgia.

4. Teaching

(a) Teaching at the University of Oregon

The courses I have taught at the University of Oregon since 2003 are these: *Intermediate Microeconomics* (EC 311), *Public Economics and Inequality* (EC 410/510), *Mathematics for Economists* (EC 408/508), *Advanced Microeconomics* (EC 411/511), *Econometrics* (EC 423/523), *Inequality, Poverty and Redistribution* (EC 607) and *General Equilibrium, Welfare and Social Choice* (EC 607).

(b) Teaching at the University of York, 1979-2003

Postgraduate: My principal teaching was the M.Sc. option *Taxation and Distribution*. I also taught a post-M.Sc. course, *Dynamic Optimization* each year, as well as the *Mathematics for Economists* course for the M.Sc. in Economics. In 1986 I designed and began teaching the *Quantitative Methods* component of the newly-instituted annual Summer Session for intending postgraduate students.

Undergraduate: I taught the 2nd year core course *Mathematical Techniques in Economics* and 1st year option *Mathematics 1*. I also taught part of the 3rd year special subject *Public Economics*, a 3rd year optional course *Decision Theory*, and 3rd year *Applied Economics* seminars. I directed Project work.

Teaching, *continued*

(c) Supervision of postgraduate research

At the University of Oregon: I have so far been a member of three doctoral committees. Oguzhan Dincer's PhD thesis entitled *Essays on the Effects of Institutional Quality on Economic Growth and Development* was successfully examined in 2005. Matthew Cole's thesis entitled *The choice of modeling firm heterogeneity and trade restrictions* was successfully examined in May 2009. Ania Aksan's field paper is entitled *Intellectual Property Rights and the Health Needs of the Poor*.

I have also served on two Masters thesis committees in the Public Policy and Management Department: in 2006 for Kinam Kim, whose topic was *The Redistributive Effect Of Taxes And Transfers In The US*, and in 2007 for Tihamiyou Baba Moussa, whose topic was *How Has Public Policy In French Speaking Africa Been Influenced By Colonial Legacy And Culture, And What Are The Implications For The Future?*

At the University of York: I had six research students working on distributional issues, all of whom have obtained now their research degrees. The successful theses are: *Computable General Equilibrium Analysis of the Tax-Benefit System* (Alan Duncan, D.Phil., supervised jointly with Professor J.P. Hutton and in collaboration with the Institute for Fiscal Studies, London); *Equality of Opportunity, Income Distributions and Taxes* (Vito Peragine, D.Phil.); *Inequality, Welfare and Poverty Comparisons* (Claudio Zoli, D.Phil.); *Income Tax Differentiation, Equity and Tax Competition* (Maria Cubel, Ph.D.); *Multidimensional Poverty Analysis* (Rocio Garcia-Diaz, Ph.D., for whom I contributed external supervision after leaving York), *The Mexican Tax and Benefit System* (Esther Mondragon-Barreto, M.Phil.).

I was a member of many thesis advisory groups throughout my time at York, primarily covering topics in Public Finance and Health Economics. At the time of leaving York at the end of 2003, I belonged to six of these groups. I also supervised M.Sc. dissertations annually.

5. Administration

(a) University responsibilities at the University of Oregon

I was elected to the University Senate to represent Social Sciences within the College of Arts and Sciences in June 2006 for a period of 2 years.

(b) Departmental responsibilities at the University of Oregon

I am currently the Economics Department's *Charitable Fund Drive Coordinator*, and a member of the *Personnel Committee*, which deals with promotion cases. I have been a member of the *PhD Program Committee*, the *Econometrics Curriculum Committee* and the *Committee on Outside Funding (COOF)*. I was Chair of *COOF* in 2006/7.

(c) University responsibilities at the University of York

In 1999 I was appointed to serve as a member of the University's Graduate & Undergraduate Studies Committee (GUSC) for 3 years. GUSC considers amendments to the Ordinances and Regulations, and also rules on a range of issues affecting graduate and undergraduate registration, study and examining. In 2002 I was elected to the Senate of the University of York for a period of 2 years.

5. Administration, *continued*

(d) Departmental responsibilities at the University of York

In 1998 I became Director of the Department of Economics and Related Studies' Graduate School, one of the largest in the UK, with well in excess of 150 Masters students annually and over 100 doctoral students. In this role I had overall responsibility for: graduate admissions, the running of the Department's eight M.Sc. programmes and summer session, graduate examinations, supervision and research training arrangements for research students, training and support of Teaching Fellows and Graduate School publicity.

As Director of the Graduate School I was also an *ex officio* member of Strategy Committee (advising the Head of Department on long-term policies and plans, appointments, *etc*) and of Research Committee (advising on research policy and other departmental research-related affairs; liaising with the University Research Committee; overseeing major external research reviews, *etc*).

From 1989 until 1997, my major departmental responsibility was the Chairmanship of the Graduate Admissions Panel, with responsibility for admissions to the Department's one- and two-year M.Sc. programmes. This involved processing some 500 applications annually; pre-filtering unsuitable applicants; collating the views of the Panel to determine what offers should be made; liaising with the Graduate Schools Office; communicating offers and asking for additional information where necessary; advising applicants on grants and answer other individual queries; and advising the Graduate Schools Office on the suitability of applicants for the Overseas Student Scholarship Fund.

I was also the first Director of the Departmental Teaching Fellowship Programme, holding this post from 1994 until 1997. The job involved monitoring the performance of about 20 postgraduate tutors, both to aid their personal and professional development and in pursuit of teaching quality objectives.

In 1986 I set up and organized, the Department's 9-week Summer Session in Microeconomics and Quantitative Methods, which now runs annually for intending students of the Department's nine M.Sc. courses, and for other interested parties.

6. Research

i Books

1. Lambert, P.J. and D.S. Poskitt. *Stationary Processes In Time Series Analysis: The Mathematical Foundations*, pp. 127. Göttingen: Vandenhoeck & Ruprecht, 1983.
2. Lambert, P.J. *Advanced Mathematics For Economists: Static and Dynamic Optimization*, pp. 231. Oxford: Blackwell, 1985. Republished as *Advanced Math for Economics*, Wiley-Blackwell, 1995.
3. Hey, J.D. and P.J. Lambert, editors. *Surveys In The Economics Of Uncertainty*, pp. 232. Oxford and New York: Blackwell, 1987 (paperback edition 1989).
4. Lambert, P.J. *The Distribution and Redistribution of Income: A Mathematical Analysis*, pp. 302. Oxford: Blackwell, 1989. Expanded paperback edition: Manchester University Press, 1993.
5. Lambert, P.J. *La Distribución y Redistribución de la Renta*. Madrid: Instituto de Estudios Fiscales, 1996. Spanish version, with new Foreword, of expanded 1993 edition of book number 4 above.
6. Lambert, P.J. *The Distribution and Redistribution of Income*, pp. 302. Manchester: University Press, 2001. Major rewrite of book number 4 above, with new chapters on poverty and horizontal inequity.
7. Lambert, P.J., editor. *Equity: Research on Economic Inequality, Volume 15*, pp. 305. Oxford UK: Elsevier Science. ISBN: 978-0-7623-1450-8.

ii Parts of Books

1. Hutton, J.P. and P.J. Lambert. A new approach to the measurement of the elasticities of federal and state individual income taxes. Pages 35-44 in *Proceedings of 74th Annual Conference of the National Tax Association - Tax Institute of America*. Chicago: NTA-TIA, 1982.
2. Lambert, P.J. Net fiscal incidence progressivity: some approaches to measurement. Pages 519-532 in W. Eichhorn (ed.) *Measurement in Economics: Theory and Applications of Economic Indices*. Heidelberg: Physica-Verlag, 1988.

ii Parts of Books, continued

3. Lambert, P.J. and W. Pfähler. Income tax reform and social welfare. Pages 85-98 in J.K. Brunner and H.-G. Petersen (eds.) *Simulation Models in Tax and Transfer Policy*. Frankfurt: Campus, 1990.
4. Lambert, P.J. The equity-efficiency trade-off: Breit reconsidered. Pages 91-104 in P.J.N. Sinclair and M.D.E. Slater (eds.) *Taxation, Private Information and Capital*. Oxford: Clarendon Press, 1991. This is also journal article 32 ahead.
5. Lambert, P.J. La valutazione degli impatti redistributivi e di benessere delle riforme fiscali (*transl.*: Evaluating the redistributive and welfare impacts of tax reforms). Pages 167-230 in L. Bernardi (ed.) *Decisioni di Finanza Pubblica e Valutazione delle Riforme Fiscali*. Bologna: Società Editrice Il Mulino, 1992.
6. Lambert, P.J. The distribution and redistribution of income. Chapter 9, pp. 200-226 in P.M. Jackson (ed.) *Current Issues in Public Sector Economics*. Macmillan, 1993.
7. Lambert, P.J. Income tax progression and inequality reduction. Pages 260-270 in W.E. Diewert, K. Spremann and F. Stehling (eds.) *Mathematical Modelling in Economics*. Berlin: Springer Verlag, 1993 .
8. Lambert, P.J. Redistribution through the income tax. Pages 1-16 in J. Creedy (ed.) *Taxation, Poverty and Income Distribution*. Aldershot: Edward Elgar, 1994. Reprinted as pages 299-315 in W. Eichhorn (ed.) *Models and Measurement of Welfare and Inequality*. Berlin: Springer Verlag, 1994.
9. Lambert, P.J. Measuring progressivity with differences in tax treatment. Pages 17-27 in J. Creedy (ed.) *Taxation, Poverty and Income Distribution*. Aldershot: Edward Elgar, 1994. Spanish translation published as "La medición de la progresividad con diferencias de tratamiento fiscal" in *Hacienda Publica Española*, vol. 129(2), pp. 97-103, 1994.
10. Lambert, P.J. and J.R. Aronson. Inequality decomposition analysis and the Gini coefficient revisited. Pages 217-228 in S.R. Chakravarty, D. Coondoo and R. Mukherjee (eds.) *Quantitative Economics: Theory and Practice (Essays in Honour of Professor N. Bhattacharya)*. Calcutta: Allied Publishers (for the Indian Statistical Institute), 1998. This is also journal article 40 ahead.

ii Parts of Books, *continued*

11. Lambert, P.J. Redistributive effects of progressive income taxes. Pages 485-509 in Silber, J. (ed.) *Handbook on Income Inequality Measurement*. Norwell, MA: Kluwer Academic Publishing, 1999.
12. Jenkins, S.P. and P.J. Lambert. Horizontal inequity measurement: a basic reassessment. Pages 535-553 in Silber, J. (ed.) *Handbook on Income Inequality Measurement*. Norwell, MA: Kluwer Academic Publishing, 1999.
13. Lambert, P.J. On the redistributive effect of taxes and benefits. Chapter 29, pages 553-568, in M. Sattinger (ed.) *Income Distribution, Volume III: Income Shares and Policy*. Cheltenham: Edward Elgar, 2001. This is also journal article 20 ahead.
14. Lambert, P.J. Equivalence scales, horizontal equity and horizontal inequity. Pages 75-84 in Dagum, C. and G. Ferrari (eds) *Household Behaviour, Equivalence Scales, Welfare and Poverty*. Heidelberg: Physica-Verlag, 2004.
15. Millimet, D., D. Slottje, and P. J. Lambert. Inequality aversion, income inequality and social policy in the US: 1947 – 1998. Chapter 17, pages 295-323, in Betti, G. and Lemmi, A. (eds.) *Advances on Income Inequality and Concentration Measures*. London: Routledge, 2008.
16. Lambert, P.J. Positional equity and equal sacrifice: design principles for an EU-wide income tax? In Fleurbaey, M., M. Salles and J.A. Weymark (eds.) *Social Ethics And Normative Economics*, a volume in the series *Studies in Choice and Welfare*, Springer, forthcoming, 2009.

iii Contributions to Journals

a) In Mathematics:

1. Lambert, P.J. Characterizing groups by their character tables, I. *Oxford Quarterly Journal of Mathematics*, vol. 23, pp. 427-434, 1972.
2. Lambert, P.J. Characterizing groups by their character tables, II. *Oxford Quarterly Journal of Mathematics*, vol. 24, pp. 223-240, 1973.

a) In Mathematics, continued

3. Lambert, P.J. Characterizing groups by their character tables, III. *Oxford Quarterly Journal of Mathematics*, vol. 25, pp. 29-40, 1974.
4. Lambert, P.J. and R.N. York. A new method of data presentation. *West African Journal of Archaeology*, vol. 5, pp. 213-219, 1975.
5. Lambert, P.J. Projective special linear groups in characteristic 2. *Communications in Algebra*, vol. 4, no. 9, pp. 873-879, 1976.
6. Lambert, P.J. A characterization of $PSL(4,q)$, q even, $q > 4$. *Illinois Journal of Mathematics*, vol. 21, pp. 255-265, 1977.

b) In Economics:

7. Lambert, P.J. and J.D. Hey. Attitudes to risk. *Economics Letters*, vol. 2, pp. 215-218, 1979.
8. Hutton, J.P. and P.J. Lambert. Income tax progressivity and revenue growth. *Economics Letters*, vol. 3, pp. 377-380, 1979.
9. Hey, J.D. and P.J. Lambert. Relative deprivation and the Gini coefficient: comment. *Quarterly Journal of Economics*, vol. 95, pp. 567-573, 1980.
10. Hutton, J.P. and P.J. Lambert. Evaluating income tax revenue elasticities. *Economic Journal*, vol. 90, pp. 901-906, 1980.
11. Lambert, P.J. Inequality and social choice. *Theory and Decision*, vol. 12, pp. 395-398, 1980.
12. Turner, R.E. and P.J. Lambert. Commodity concentration and export earnings instability: a comment. *Economic Journal*, vol. 91, pp. 755-757, 1981.
13. Lambert, P.J. and A.P. Weale. Equality, risk aversion and contractarian social choice. *Theory and Decision*, vol. 13, pp. 109-127, 1981.

iii Contributions to Journals, *continued*

14. Fries, A., J.P. Hutton and P.J. Lambert. The elasticity of the U.S. individual income tax: its calculation, determinants and behaviour. *Review of Economics and Statistics*, vol. 64, pp. 147-151, 1982.
15. Hutton, J.P. and P.J. Lambert. Modelling the effects of income growth and discretionary change on the sensitivity of U.K. income tax revenue. *Economic Journal*, vol. 92, pp. 15-155, 1982.
16. Hillier, B., P.J. Lambert and R.E. Turner. Macroeconomics with non-perfect competition: a comment. *Economic Journal*, vol. 92, pp. 701-705, 1982.
17. Hutton, J.P. and P.J. Lambert. Simulating the revenue elasticity of an individual income tax. *Economics Letters*, vol. 9, pp. 175-179, 1982.
18. Hutton, J.P. and P.J. Lambert. Inequality and revenue elasticity in tax reform. *Scottish Journal of Political Economy*, vol. 30, pp. 221-234, 1983.
19. Lambert, P.J. Non-equiproportionate income growth, inequality and the income tax. *Public Finance/Finances Publiques*, vol. 39, pp. 104-118, 1984.
20. Lambert, P.J. On the redistributive effect of taxes and benefits. *Scottish Journal of Political Economy*, vol. 32, pp. 39-54, 1985.
21. Lambert, P.J. Social welfare and the Gini coefficient revisited. *Mathematical Social Sciences*, vol. 9, pp. 19-26, 1985.
22. Lambert, P.J. Endogenizing the income distribution: the redistributive effect, and Laffer effects, of a progressive tax-benefit system. *European Journal of Political Economy*, vol. 1, pp. 3-20, 1985.
23. Lambert, P.J. Describing the macroeconomy: the rôle of sticky taxes. *Studies in Economic Analysis*, vol. 9, pp. 17-27, 1985.
24. Lambert, P.J. and J.R. Suckling. The revenue elasticity of the Zimbabwean individual income tax, 1967-1981. *Zimbabwe Journal of Economics*, vol. 1, pp. 1-9, 1986.

iii Contributions to Journals, *continued*

25. Lambert, P.J. Getting on the wrong side of the Laffer curve. *European Journal of Political Economy*, vol. 2, pp. 193-202, 1986.
26. Lambert, P.J. and W. Pfähler. Intersecting tax concentration curves and the measurement of tax progressivity: a rejoinder. *National Tax Journal*, vol. 40, pp. 635-638, 1987.
27. Dardanoni, V. and P.J. Lambert. Welfare rankings of income distributions: a role for the variance and some insights for tax reform. *Social Choice and Welfare*, vol. 5, pp. 1-17, 1988.
28. Lambert, P.J. and W. Pfähler. On aggregate measures of the net redistributive impact of taxation and government expenditure. *Public Finance Quarterly*, vol. 16, pp. 178-202, 1988.
29. Lambert, P.J. Okun's bucket: a leak and two splashes? *Journal of Economic Studies*, vol. 15, pp. 71-78, 1988.
30. Acemoglu, D. and P.J. Lambert. Equiproportionate growth of incomes and fiscal drag. *Bulletin of Economic Research*, vol. 41, pp. 295-302, 1989.
31. Johnson, P. and P.J. Lambert. Measuring the responsiveness of income tax revenue to income growth: a review and some U.K. values. *Fiscal Studies*, vol. 10, No. 4, pp. 1-18, 1989.
32. Lambert, P.J. The equity-efficiency trade-off: Breit reconsidered. *Oxford Economic Papers*, vol. 42, pp. 91-104, 1990.
33. Hayes, K.J., P.J. Lambert, G.W. Scully and D.J. Slottje. The equality-efficiency trade-off: an approach to measurement and some estimates for the U.S. economy. *Journal of Economic and Social Measurement*, vol. 16, pp. 231-239, 1990.
34. Lambert, P.J. Rich-to-poor income transfers reduce inequality: a generalization. *Research on Economic Inequality*, vol. 2, pp. 183-192, 1992.
35. Lambert, P.J. and W. Pfähler. Income tax progression and redistributive effect: the influence of changes in pre-tax income distribution. *Public Finance/Finances Publiques*, vol. 47, pp. 1-16, 1992.

iii Contributions to Journals, *continued*

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84. Lambert, P.J. Mini-Symposium: The 1990, 1992 and 1993 papers on distributionally sensitive measures of unemployment by Manimay Sengupta and Anthony Shorrocks. *Journal of Economic Inequality*, vol. 7, pp. 269-271, 2009.
85. Lambert, P.J. and F. Stähler. Foreword: Sophie Elliott's paper on equity and equality. *Oxonomics*, vol. 4, p. 32, 2009.
86. Essama-Nssah, B. and P.J. Lambert. Measuring pro-pooriness: a unifying approach with new results. *Review of Income and Wealth*, vol. 55, pp. 752-778, 2009.
87. Esposito, L. and P.J. Lambert. A note on the Bourguignon-Fields class of poverty indices. *Journal of Public Economics*, vol. 93, pp. 852-854, 2009.
88. Lambert, P.J. and I. Urban. Miodrag Tomić's 1949 article on inequalities. *Journal of Economic Inequality*, forthcoming, 2010. DOI 10.1007/s10888-009-9119-2.

iv Papers given at International Conferences, etc.

I have given invited seminars at African, North American, Asian, Australasian and European universities and have read papers at the following international gatherings:

1. *74th Annual Conference of National Tax Association - Tax Institute of America*, Chicago 1982;
2. *European Meeting of the Econometric Society*, Pisa 1983;
3. *4th International Symposium on Measurement in Economics*, Karlsruhe 1985;
4. *Meeting of the European Public Choice Society*, Reggio Calabria 1987;
5. *Workshop on Prospects and Limits of Simulation Models in Tax and Transfer Policy*, Giessen 1988;
6. *Symposium on Distributive Justice*, Bonn 1989;
7. *4th Annual Congress of European Economic Association*, Augsburg 1989;
8. *5th International Symposium on Models and Measurement of Welfare and Inequality*, Karlsruhe 1990;
9. *International Workshop on Microsimulation Models: Problems and Perspectives*, Rome 1990;
10. *66th Annual International Conference of the Western Economic Association*, Seattle 1991;
11. *1st Meeting of Society for Social Choice and Welfare*, Caen 1992;
12. *International Conference on Income Distribution*, Melbourne 1992;
13. *Seminar on Inequality and the Taxation of Incomes*, Bordeaux 1993;
14. *Second Workshop of the ECuity Project (Equity in the Finance and Delivery of Health Care in Europe)*, Copenhagen 1994;
15. *European Meeting of the Econometric Society*, Maastricht 1994;
16. *9th Annual Congress of European Economic Association*, Maastricht 1994;
17. *Conference on Income Distribution and Economic Development*, Madrid 1994;
18. *Conference on Poverty and Social Exclusion*, Leuven 1995.
19. *2nd Meeting of the Canadian Public Economics Study Group*, Quebec City, 1996.
20. *3rd International Meeting: Society for Social Choice and Welfare*, Maastricht, 1996
21. *Poverty: Global, National and Regional Perspectives. 8th World Congress of Social Economics*, Charleston SC, 1996
22. *New Contributions to the Analysis of Distribution and Income Taxation: Congr s Internacional d'Economia de la Catalunya Central*, Manresa (Barcelona), 1997.
23. *Fifth International Meeting of the Society for Social Choice and Welfare*, Alicante 2000;
24. *8th World Congress of the Econometric Society*, Seattle 2000.
25. *CESifo Area Conference on Public Sector Economics*, Munich 2001;
26. *76th Annual International Conference of the Western Economic Association*, San Francisco 2001;
27. *International Meeting on Equivalence Scales, Household Behaviour and Welfare*, Dipartimento di Statistica "G. Parenti", Universit  degli Studi di Firenze, June 2002;
28. *6th International Meeting of the Society for Social Choice and Welfare*, Pasadena 2002;
29. *Conference on Tax Policy in EU Candidate Countries on the Eve of EU Enlargement*, Riga 2003;
30. *First Meeting of the Society for the Study of Economic Inequality (ECINEQ)*, Majorca, 2005;
31. *Social Ethics And Normative Economics: conference in honour of Professor Serge-Christophe Kolm*, Caen, 2007;
32. *Second Meeting of the Society for the Study of Economic Inequality (ECINEQ)*, Berlin, 2007;
33. *International Conference on Welfare State Performance and Design*. Institute of Public Finance, Zagreb, 2008;

v Research in Progress

The following manuscripts are either under submission, being revised or in preparation:

1. On the measurement of horizontal inequity. *Working Paper No. WP/95/135*, International Monetary Fund, 1995.
2. S.C. Parker and P.J. Lambert. Measuring horizontal inequity econometrically. *Working Paper No. 97/18*, Institute for Fiscal Studies, London, 1997.
3. Horizontal inequity: some new perspectives. *Working Paper No. 162*, Centre for Economic Studies, University of Munich, 1998.
4. C. Zoli and P.J. Lambert. Sequential procedures for poverty gap dominance. *Economics Discussion Paper No. 2005-1*, University of Oregon, 2005, and *Working Paper No. Child n. 01/2005*, Centre for Household, Income, Labour and Demographic Economics, University of Torino, Italy, 2005.
5. O.C. Dincer and P.J. Lambert. Taking care of your own: ethnic and religious heterogeneity and income inequality. *Economics Discussion Paper No. 2006-9*, University of Oregon, and *Working Paper No. 2006-48*, ECINEQ, Milan, 2006.
6. L. Esposito and P.J. Lambert. Poverty measurement: prioritarianism and the fourth 'I' of poverty. *Mimeo*, University of Oregon, 2009. See also Esposito and Lambert, "A fourth 'I' of poverty?" *Economics Discussion Paper No. 2007-2*, University of Oregon, 2007.
7. O.C. Dincer, M. Hotard and P.J. Lambert. Ethnic and religious diversity and income inequality. *Mimeo*, Illinois State University, 2009.
8. Aronson, J.R and P.J. Lambert, The potential for short run shifting of a corporate profits tax. *Mimeo*, Lehigh University, 2009
9. Bosmans, K., L. Esposito and P.J. Lambert. New perspectives on a more-or-less familiar poverty index, with extensions. *Working Paper No. 2009-116*, ECINEQ, Milan, 2009.
10. Pro-poor growth and the lognormal income distribution. *Working Paper No. 2009-130*, ECINEQ, Milan, 2009.

vi Statement of Research Interests

I maintain an active research interest in the applications of mathematics to the whole spectrum of economic problems, but the main thrust of my research concerns the measurement problems and normative issues associated with the distribution and redistribution of income through the tax and benefit systems.

When taxes are progressive on income, the response of the tax yield to income growth is elastic. I have studied this phenomenon in close detail. See journal articles 8, 10, 14, 15, 17, 18, 19, 24, 30, 31 and item 1 under "Parts of books".

Another feature of income tax progression is its equalizing effect on the distribution of post-tax income. Measuring this effect, subjecting it to assumptions about taxpayer response, and extending measurement from taxes to the entire fiscal system are important questions, and major ongoing concerns. Journal articles 20, 22, 26-29, 32-36, 38, 58-59 and 68, and items 2-6 and 11 under "Parts of books" address these kind of problems.

A particular challenge for the 1990s and beyond has been to extend our knowledge of, and ability to predict, income tax effects *from* the case of income-determined taxes *to* the more complex scenario in which the income tax is a multi-attribute one. Items 7-9 under "Parts of books" and journal articles 39, 42 – 44, 67 and 81 are directed towards this end.

Horizontal and vertical equity (respectively, the equal treatment of equals and the appropriately unequal treatment of unequals) are two basic commands of social justice which have engaged the attention of income tax specialists considerably in the last 15 years. Items 12, 14 and 16 under "Parts of books", journal articles 45, 47, 49, 51-52, 55, 56, 60-62, 64-66, 71-73, 82, 83 and manuscripts 1-3 offer perspectives on these issues.

My research activity also includes a concern with methodological problems which arise in the assessment of needs and measurement of poverty and inequality. Journal articles 9, 11, 21, 40, 74 and 76 focus upon inequality measurement; articles 57, 69 and 75 consider the needs issue; articles 41, 50, 53-54, 86-87 and manuscripts 4, 6, 9 and 10 address poverty issues. In particular, I have been pursuing the means to achieve robust poverty comparisons across regimes (countries, years or socioeconomic groupings) in which needs and also poverty standards may differ, and when incomes are growing.

A recent addition to my research activity has arisen from a conjecture about inequality between nations and through time. What if there were a "natural rate" of inequality, the same in all countries or at all time periods, the differences we perceive arising because we do not use country-specific or time-point-specific distributional judgement parameters when we take measurements? For the data to accord with this hypotheses, a new view of inequality generation and of macroeconomic adjustment

vi Statement of Research Interests, *continued*

becomes necessary. Articles 70 and 77 and item 15 under “Parts of books” investigate this issue. Manuscripts 5 and 7 also investigate possible sources of inequality generation.

Another addition to my research concerns price discrimination effects in insurance markets. The use of genetic screening to determine premia for health insurance causes inequities among insured persons if the screening test is imperfect. Such inequities can be quantified, and the implications of better screening analyzed, using approaches closely allied to those I have developed, with co-authors, to measure inequities arising from the income tax. Article 63 is a first foray into this area.

I have in recent years taken up an interest in the existence of unpublished works in my main research area – papers on distribution and redistribution which, for one reason or another, have been forgotten or neglected, or were never published, but contain important material that has since entered the literature in other guises or tangentially. In connection with this interest, I introduced the “Rediscovered Classics” section in *The Journal of Economic Inequality* and am its Editor. Articles 78, 80 and 84 are my Introductions to the first three “rediscovered classics” published in this journal.

My contributions to public debate include letters to the Editors of *Lloyds Bank Review* (“Taxation and Incentives in the UK”, vol. 136, pp. 49-51, 1980) and *The Guardian* (“Incentives, but for whom?”, 19th January 1981), both written jointly with J. P. Hutton, and a newspaper article, “Rich Tax Pickings for South-East Home Buyers”, published in *The Guardian* (Economics Agenda, 14th August, 1985), concerning mortgage interest relief and written jointly with C. N. Morris. At the other end of the spectrum, I have addressed the Inter-Governmental Group on Tax Modelling at H.M. Treasury in London.