

What does it mean to be poor?
**An investigation of the qualitative-quantitative
divide in Mozambique**

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Investigating the qualitative–quantitative divide in Mozambique

Sam Jones¹ and Inge Tvedten²

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- Poverty an enduring theme across social sciences

... today c. 800m people are estimated to be poor, of which 50% live in Africa (Ravallion and Chen, 2017)

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Objectives of this study

- (1) Explore (the different) understandings of poverty as seen from **quantitative** (economic) and **qualitative** (anthropology) perspectives

... taking Mozambique as a case in point (for examples, see the WP)

... *a priori* we do not seek just what is in common

... we wish to let each discipline speak for itself

- (2) Reveal the underlying **philosophical positions** which underpin concrete analyses in different disciplines

Caveat lector: we do not cover *all* conceptualizations of poverty. AND we *do* simplify both the qual and quant positions (for didactic purposes)

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Agenda

- 1** Quantifying poverty
- 2** 'Qualifying' poverty
- 3** Philosophical positions
- 4** Implications

(1) Quantifying poverty

Approach

Objective := identify **who is poor**, based on an objective definition of material deprivation that is (in principle) consistent through space and time

In doing so, we assume:

... utility \leftrightarrow consumption (money-valued)

... such that, \uparrow consumption $\implies \uparrow$ utility

- Define a poverty line (z) in monetary terms:

$$\bar{u}_z = w(\bar{c}_z) \quad (1)$$

$$z_i = e(p_i, x_i, \bar{u}_z) \quad (2)$$

- How can we identify \bar{u}_z ? = 'Cost of Basic Needs'

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Measures of poverty and inequality

Results from applying this approach,
using the series of four existing household surveys (IAFs/IOFs):

	1996/97	2002/03	2008/09	2014/15	Growth
No. consumption baskets	0.7	1.0	1.0	1.1	2.1%
Poverty headcount	68.8	52.7	51.5	46.3	-2.2%
Poverty gap	28.7	19.3	19.0	16.7	-3.0%
Squared poverty gap	15.3	9.5	9.7	8.3	-3.4%
Gini (x100)	40.5	41.5	41.7	46.8	0.8%

Notes: 'No. consumption baskets' reports the number of baskets equal in value to the Cost of Basic Needs poverty line that the median household can purchase; the poverty gap and its square are expressed as a proportion of the poverty line; growth is annualized over the full period.

Extensions

The basic 'data' on who is poor can be extended/used in multiple ways:

- Disaggregation by region, gender, employment status etc.
 - A **poverty profile** → multivariate analysis of the correlates of poverty.
 - This reveals (see next):
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- Useful to evaluate/trace (in broad terms) the impact of economic policies on household welfare

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Location →	National	By location (pooled)		By year			
Survey year →	All	Urban	Rural	1996/97	2002/03	2008/09	2014/15
Column →	(1)	(2)	(3)	(4)	(5)	(6)	(7)
Age of household head	-0.3*** (0.1)	-0.2* (0.1)	-0.2** (0.1)	-0.2 (0.1)	-0.1 (0.1)	-0.4** (0.1)	0.0 (0.1)
Is household head female?	-8.9*** (1.2)	-9.3*** (1.7)	-9.7*** (1.5)	-11.2*** (2.4)	-10.5** (3.3)	-6.8** (2.4)	-12.0*** (1.3)
Household size	-2.6*** (0.7)	0.1 (0.7)	-8.1*** (1.1)	-18.1*** (2.1)	-7.5*** (2.1)	-0.3 (0.9)	-7.4*** (0.8)
Adult males (% household)	62.7*** (3.7)	73.1*** (5.8)	60.7*** (5.1)	16.4 (8.5)	47.5*** (9.0)	60.5*** (7.9)	64.8*** (4.2)
Adult female members (%)	74.6*** (4.3)	90.9*** (6.1)	70.8*** (6.3)	30.6*** (8.9)	64.7*** (9.3)	68.9*** (9.8)	67.3*** (4.4)
Young female members (%)	54.6*** (4.8)	51.8*** (8.0)	56.6*** (6.6)	49.9*** (9.7)	39.5*** (11.3)	46.1*** (10.3)	38.1*** (5.4)
Household members <7 years (%)	-7.4*** (0.8)	-11.0*** (1.1)	-3.4*** (1.0)	-5.7*** (1.4)	-7.9*** (1.7)	-7.2*** (1.6)	-8.0*** (0.7)
Household members 7–14 (%)	-6.9*** (0.7)	-9.6*** (0.8)	-2.1* (1.0)	-5.5*** (1.2)	-7.1*** (1.4)	-6.8*** (1.3)	-5.1*** (0.7)
Years of education (workers)	2.1*** (0.4)	4.5*** (0.7)	3.1*** (0.6)	7.1*** (1.0)	-0.5 (1.2)	1.0 (1.0)	0.4 (0.4)
Years of education (workers) sqrd.	0.6*** (0.0)	0.5*** (0.0)	0.2** (0.1)	0.3* (0.1)	0.9*** (0.1)	0.7*** (0.1)	0.6*** (0.0)
Ag. and non-farm household	19.4*** (1.5)	18.7*** (2.3)	20.6*** (2.0)	18.0*** (3.2)	19.9*** (3.5)	13.3*** (3.5)	22.0*** (1.5)
Non-farm enterprise household	37.8*** (1.9)	35.1*** (2.3)	46.5*** (4.4)	31.1*** (5.2)	46.5*** (4.7)	39.4*** (4.6)	36.3*** (1.8)
Household is wage earning	30.4*** (2.1)	27.0*** (2.4)	38.4*** (5.6)	12.8* (5.7)	35.3*** (5.1)	21.0*** (4.3)	35.5*** (2.1)

Location →	National	By location (pooled)		By year			
		All	Urban	Rural	1996/97	2002/03	2008/09
Province: Cabo Delgado	3.1 (2.0)	15.7*** (4.1)	-0.1 (2.2)	14.9** (4.9)	-27.8*** (4.1)	-5.7 (4.2)	20.9*** (2.4)
Province: Nampula	-6.8*** (1.8)	5.2 (3.1)	-9.3*** (2.1)	-4.5 (4.3)	-15.1*** (4.2)	-22.4*** (4.1)	5.2** (1.9)
Province: Zambézia	-8.0*** (1.8)	-4.8 (3.2)	-9.3*** (2.1)	5.4 (4.0)	-5.6 (4.4)	-38.2*** (4.0)	4.2* (2.0)
Province: Tete	-1.6 (2.0)	-13.1*** (3.4)	-0.9 (2.3)	-18.7*** (4.3)	-36.9*** (4.7)	-15.7** (4.8)	35.5*** (2.2)
Province: Manica	2.4 (2.1)	12.6*** (3.1)	0.9 (2.5)	26.4*** (4.7)	-9.3 (5.5)	-34.0*** (4.2)	26.8*** (2.1)
Province: Sofala	-5.3* (2.5)	14.6*** (3.0)	-12.7*** (3.4)	-34.3*** (4.5)	11.4* (5.0)	-38.2*** (6.5)	27.3*** (2.3)
Province: Inhambane	-20.5*** (2.3)	10.6** (3.5)	-27.6*** (2.8)	-15.4*** (4.4)	-68.6*** (5.1)	-19.9*** (5.4)	14.6*** (2.4)
Province: Gaza	-2.9 (2.3)	16.0*** (3.7)	-6.3* (2.8)	20.2*** (4.9)	-9.8* (4.7)	-40.7*** (5.6)	13.3*** (2.6)
Province: Maputo	-6.9** (2.3)	11.3*** (3.0)	-22.8*** (3.4)	8.4 (5.9)	-48.8*** (4.6)	-48.3*** (5.2)	45.4*** (2.2)
Province: Maputo City	9.9*** (2.4)	18.2*** (2.9)	-	6.1 (7.1)	-26.7*** (5.2)	-18.0*** (5.3)	57.3*** (2.4)
Rural location (dummy)	19.2*** (1.2)	-	-	13.0*** (3.3)	18.9*** (2.7)	15.1*** (2.5)	28.1*** (1.3)
Time trend (in years)	1.4*** (0.1)	0.8*** (0.1)	1.5*** (0.1)	-	-	-	-
Observations	54,981	26,237	28,744	7,645	8,192	10,013	29,131
R-squared (adjusted)	0.30	0.41	0.22	0.34	0.32	0.26	0.41

significance levels: * .05 ** .1 *** .

(2) 'Qualifying' poverty

Approach

Objective := appreciate the **lived experience** of the most vulnerable (poor) and the complex of **social relations** that structure these experiences

Also, begins with assumptions:

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- People are encountered in specific contexts and face particular social, political and economic structures, which have a significant influence on events and possibilities
- *How people make sense of (interpret and rationalise) their situation cannot be assumed *ex ante*, but is itself a basic object of investigation → hermeneutics*
- *A central focus is on how existing structural constraints evolve and reproduce social structures (of better- and worse-off)*
- *Expect the form/nature of poverty to vary across contexts*

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Results

Ethnographic fieldwork (longitudinal) makes up the basic data.

Undertaken in Mozambique in various locations: *Murrupula* (Nampula); *Maputo cidade*; *Buzi* (Sofala); *Cuamba, Majune e Lago* (Niassa).

Examples of local definitions/conceptions of poverty:

Category // Location	Murrupula	Maputo	Buzi
<i>The worse-off:</i>			
Destitute	opitanha	xiculungo	umbwa
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Temporarily poor	ohikalano	xangamo	kombo
<i>The better-off:</i>			
By merit	opwalatha	xantambuluku	muthende
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Broadly speaking, poverty is frequently expressed in relative not absolute terms.

The (given) reasons for being poor vary widely – e.g., can relate to a vicious cycle begun by just a small negative shock (economic), family difficulties ('lost' husband), etc..

Among those who have been able to accumulate some wealth, a common theme is how they have navigated social pressures (e.g., 'family taxes', political authorities).

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(3) Philosophical positions

Scope for integration

Is it possible to integrate these different perspectives?

New *quantitative* methods attempt to capture certain dimensions suggested by the qualitative approach:

- Longitudinal surveys to distinguish between permanent and temporary poverty
- Subjective assessment of well-being, often expressed in relative terms
- Multi-dimensional poverty (à la Alkire-Foster)
- Capability approach (à la Sen)

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Our thesis: differences between approaches are more fundamental and reflect different philosophical positions.

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Is it possible to integrate these different perspectives?

New *quantitative* methods attempt to capture certain dimensions suggested by the qualitative approach:

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Philosophical positions

Domain	Quantitative	Qualitative
Ontological character	Realist/external	Constructed/internal
Generative mechanisms	Economic factors	Social relations
Epistemological priority	Counting (etic)	Thick description (emic)
→ Philosophy of science	<i>Naturalism</i>	<i>Anti-naturalism</i>

Ontological character

Ontology := what kind of a 'thing' is poverty?

Quantitative approach:

- Poverty is understood as deficient consumption
- = an externally verifiable & objective fact that does not relate to either individual or social perceptions (states of mind)

Qualitative approach:

- Poverty cannot be separated from its social context or the *meaning* of inter-personal relations := non-atomistic
- The experience of poverty represents a process of social marginalization (c.f., class relations)
- = the field of social relation is integral to the nature/meaning of being poor – e.g., what are the relevant units (household?)
- = a low level of consumption is a common *symptom* of poverty, but is not the fundamental aspect (neither necessary nor sufficient to be poor)

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Generative mechanisms

Mechanisms := how is poverty (re)produced?

Quantitative approach:

- Does not give a clear response (being outside the theory)
- BUT, poverty profiles and associated policy discussions typically emphasise inputs to a generic household production function – e.g., different forms of capital.
- Essentially, descriptive – e.g., while human capital tends to be strongly associated with consumption levels, what explains the extant level and distribution of this capital?

Qualitative approach:

- Focuses on the various forms of power and, in connection, *how* opportunities for mobility and change are strategically controlled (*‘opportunity hoarding’*) and by whom – e.g., access to employment depends on social relations

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Epistemology := what type of knowledge is valued?

Quantitative approach:

- Abstracts from individuals or concrete contexts
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 - Makes the social work legible and controllable (à la Scott)
- = etic

Qualitative approach:

- Thick description
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(4) Implications

Implications (and conclusion)

Different philosophical positions point to *fundamental* (irreconcilable?) tensions between disciplines := it is difficult to expect a single integrated / complete / 'best' approach.

Different approaches do not just see the same thing (poverty) but from different angles, they *see differently*.

A diversity of approaches and forms of knowledge is valuable:

- Forms of knowledge relate in different ways to existing power structures.
- Quant studies follow the evolution of consumption and aggregate micro-economic tendencies in a single key metric
= *the result of the game, in terms of consumption power*
- Qual studies help understand the social relations of poverty and structures of oppression
= *what are the rules of the game, and who sets them*

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Thanks // Obrigado

Comments & questions?

[https://www.wider.unu.edu/publication/
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