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

Sam Jones
UNU-WIDER / Research Fellow
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Investigating the qualitative–quantitative divide in Mozambique

Sam Jones¹ and Inge Tvedten²
Background

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)

Different academic disciplines often speak past each other when it comes to the conceptualization and approach to ‘poverty’

A number of studies attempt to combine alternative perspectives & methods (e.g., ‘Q-squared’), but these have limitations:
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  1. Qualitative analysis often is placed in second place (i.e., employed to qualify or nuance ‘hard’ data)
  2. There is a focus on complementarities (a harmonized view), not contrasts/conflicting viewpoints
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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 ↔ consumption (money-valued)

... such that, ↑ consumption → ↑ utility

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

  \[
  \tilde{u}_z = w(\tilde{c}_z) \tag{1}
  \]

  \[
  z_i = e(p_i, x_i, \tilde{u}_z) \tag{2}
  \]

- How can we identify \(\tilde{u}_z\) = ‘Cost of Basic Needs’
**Objective**: identify who is poor, based on an objective definition of material deprivation that is (in principle) consistent through space and time.

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

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

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- How can we identify $\bar{u}_z$? = ‘Cost of Basic Needs’
Measures of poverty and inequality

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

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>No. consumption baskets</td>
<td>0.7</td>
<td>1.0</td>
<td>1.0</td>
<td>1.1</td>
<td>2.1%</td>
</tr>
<tr>
<td>Poverty headcount</td>
<td>68.8</td>
<td>52.7</td>
<td>51.5</td>
<td>46.3</td>
<td>-2.2%</td>
</tr>
<tr>
<td>Poverty gap</td>
<td>28.7</td>
<td>19.3</td>
<td>19.0</td>
<td>16.7</td>
<td>-3.0%</td>
</tr>
<tr>
<td>Squared poverty gap</td>
<td>15.3</td>
<td>9.5</td>
<td>9.7</td>
<td>8.3</td>
<td>-3.4%</td>
</tr>
<tr>
<td>Gini (x100)</td>
<td>40.5</td>
<td>41.5</td>
<td>41.7</td>
<td>46.8</td>
<td>0.8%</td>
</tr>
</tbody>
</table>

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):

- Useful to evaluate/trace (in broad terms) the impact of economic policies on household welfare.
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  - Evolving consumption returns to education, becoming more convex (further work on this underway)
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<table>
<thead>
<tr>
<th>Location →</th>
<th>National</th>
<th>By location (pooled)</th>
<th>By year</th>
</tr>
</thead>
<tbody>
<tr>
<td>Survey year →</td>
<td>All</td>
<td>Urban</td>
<td>Rural</td>
</tr>
<tr>
<td>Column →</td>
<td>(1)</td>
<td>(2)</td>
<td>(3)</td>
</tr>
<tr>
<td>Age of household head</td>
<td>-0.3***</td>
<td>-0.2*</td>
<td>-0.2**</td>
</tr>
<tr>
<td></td>
<td>(0.1)</td>
<td>(0.1)</td>
<td>(0.1)</td>
</tr>
<tr>
<td>Is household head female?</td>
<td>-8.9***</td>
<td>-9.3***</td>
<td>-9.7***</td>
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<tr>
<td></td>
<td>(1.2)</td>
<td>(1.7)</td>
<td>(1.5)</td>
</tr>
<tr>
<td>Household size</td>
<td>-2.6***</td>
<td>0.1</td>
<td>-8.1***</td>
</tr>
<tr>
<td></td>
<td>(0.7)</td>
<td>(0.7)</td>
<td>(1.1)</td>
</tr>
<tr>
<td>Adult males (% household)</td>
<td>62.7***</td>
<td>73.1***</td>
<td>60.7***</td>
</tr>
<tr>
<td></td>
<td>(3.7)</td>
<td>(5.8)</td>
<td>(5.1)</td>
</tr>
<tr>
<td>Adult female members (%)</td>
<td>74.6***</td>
<td>90.9***</td>
<td>70.8***</td>
</tr>
<tr>
<td></td>
<td>(4.3)</td>
<td>(6.1)</td>
<td>(6.3)</td>
</tr>
<tr>
<td>Young female members (%)</td>
<td>54.6***</td>
<td>51.8***</td>
<td>56.6***</td>
</tr>
<tr>
<td></td>
<td>(4.8)</td>
<td>(8.0)</td>
<td>(6.6)</td>
</tr>
<tr>
<td>Household members &lt;7 years (%)</td>
<td>-7.4***</td>
<td>-11.0***</td>
<td>-3.4***</td>
</tr>
<tr>
<td></td>
<td>(0.8)</td>
<td>(1.1)</td>
<td>(1.0)</td>
</tr>
<tr>
<td>Household members 7–14 (%)</td>
<td>-6.9***</td>
<td>-9.6***</td>
<td>-2.1*</td>
</tr>
<tr>
<td></td>
<td>(0.7)</td>
<td>(0.8)</td>
<td>(1.0)</td>
</tr>
<tr>
<td>Years of education (workers)</td>
<td>2.1***</td>
<td>4.5***</td>
<td>3.1***</td>
</tr>
<tr>
<td></td>
<td>(0.4)</td>
<td>(0.7)</td>
<td>(0.6)</td>
</tr>
<tr>
<td>Years of education (workers) sqrd.</td>
<td>0.6***</td>
<td>0.5***</td>
<td>0.2**</td>
</tr>
<tr>
<td></td>
<td>(0.0)</td>
<td>(0.0)</td>
<td>(0.1)</td>
</tr>
<tr>
<td>Ag. and non-farm household</td>
<td>19.4***</td>
<td>18.7***</td>
<td>20.6***</td>
</tr>
<tr>
<td></td>
<td>(1.5)</td>
<td>(2.3)</td>
<td>(2.0)</td>
</tr>
<tr>
<td>Non-farm enterprise household</td>
<td>37.8***</td>
<td>35.1***</td>
<td>46.5***</td>
</tr>
<tr>
<td></td>
<td>(1.9)</td>
<td>(2.3)</td>
<td>(4.4)</td>
</tr>
<tr>
<td>Household is wage earning</td>
<td>30.4***</td>
<td>27.0***</td>
<td>38.4***</td>
</tr>
<tr>
<td></td>
<td>(2.1)</td>
<td>(2.4)</td>
<td>(5.6)</td>
</tr>
<tr>
<td>Location</td>
<td>National</td>
<td>By location (pooled)</td>
<td>By year</td>
</tr>
<tr>
<td>---------------------------</td>
<td>----------</td>
<td>----------------------</td>
<td>---------</td>
</tr>
<tr>
<td></td>
<td>All</td>
<td>Urban</td>
<td>Rural</td>
</tr>
<tr>
<td>Province: Cabo Delgado</td>
<td>3.1</td>
<td>(2.0)</td>
<td>-0.1</td>
</tr>
<tr>
<td></td>
<td>(1.8)</td>
<td>(2.1)</td>
<td>(4.3)</td>
</tr>
<tr>
<td>Province: Nampula</td>
<td>-6.8***</td>
<td>5.2</td>
<td>-9.3***</td>
</tr>
<tr>
<td></td>
<td>(1.8)</td>
<td>(3.1)</td>
<td>(2.1)</td>
</tr>
<tr>
<td>Province: Zambézia</td>
<td>-8.0***</td>
<td>-4.8</td>
<td>-9.3***</td>
</tr>
<tr>
<td></td>
<td>(1.8)</td>
<td>(3.2)</td>
<td>(2.1)</td>
</tr>
<tr>
<td>Province: Tete</td>
<td>-1.6</td>
<td>-13.1***</td>
<td>-0.9</td>
</tr>
<tr>
<td></td>
<td>(2.0)</td>
<td>(3.4)</td>
<td>(2.3)</td>
</tr>
<tr>
<td>Province: Manica</td>
<td>2.4</td>
<td>12.6***</td>
<td>0.9</td>
</tr>
<tr>
<td></td>
<td>(2.1)</td>
<td>(3.1)</td>
<td>(2.5)</td>
</tr>
<tr>
<td>Province: Sofala</td>
<td>-5.3*</td>
<td>14.6***</td>
<td>-12.7***</td>
</tr>
<tr>
<td></td>
<td>(2.5)</td>
<td>(3.0)</td>
<td>(3.4)</td>
</tr>
<tr>
<td>Province: Inhambane</td>
<td>-20.5***</td>
<td>10.8**</td>
<td>-27.6***</td>
</tr>
<tr>
<td></td>
<td>(2.3)</td>
<td>(3.5)</td>
<td>(2.8)</td>
</tr>
<tr>
<td>Province: Gaza</td>
<td>-2.9</td>
<td>16.0***</td>
<td>-6.3*</td>
</tr>
<tr>
<td></td>
<td>(2.3)</td>
<td>(3.7)</td>
<td>(2.8)</td>
</tr>
<tr>
<td>Province: Maputo</td>
<td>-6.9**</td>
<td>11.3***</td>
<td>-22.8***</td>
</tr>
<tr>
<td></td>
<td>(2.3)</td>
<td>(3.0)</td>
<td>(3.4)</td>
</tr>
<tr>
<td>Province: Maputo City</td>
<td>9.9***</td>
<td>18.2***</td>
<td>-</td>
</tr>
<tr>
<td></td>
<td>(2.4)</td>
<td>(2.9)</td>
<td>(7.1)</td>
</tr>
<tr>
<td>Rural location (dummy)</td>
<td>19.2***</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td></td>
<td>(1.2)</td>
<td>(1.2)</td>
<td>(3.3)</td>
</tr>
<tr>
<td>Time trend (in years)</td>
<td>1.4***</td>
<td>0.8***</td>
<td>1.5***</td>
</tr>
<tr>
<td></td>
<td>(0.1)</td>
<td>(0.1)</td>
<td>(0.1)</td>
</tr>
<tr>
<td>Observations</td>
<td>54,981</td>
<td>26,237</td>
<td>28,744</td>
</tr>
<tr>
<td>R-squared (adjusted)</td>
<td>0.30</td>
<td>0.41</td>
<td>0.22</td>
</tr>
</tbody>
</table>

Significance levels: * .05 ** .1 *** .01 .001
(2) ‘Qualifying’ poverty
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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Also, begins with assumptions:

- 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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- Expect the form/nature of poverty to vary across contexts
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).

<table>
<thead>
<tr>
<th>Category // Location</th>
<th>Murrupula</th>
<th>Maputo</th>
<th>Buzi</th>
</tr>
</thead>
<tbody>
<tr>
<td>The worse-off:</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
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Examples of local definitions/conceptions of poverty:

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12 / 20
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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). – e.g., one entrepreneur in rural Niassa rural suffered a major social disgrace – almost no one attended his funeral as he had not supported the community sufficiently
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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)
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New methods are welcome and add value. BUT, typically a primary objective remains to count who is poor.

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</tr>
<tr>
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<td>Economic factors</td>
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<tr>
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<td>Thick description (emic)</td>
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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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  = etic

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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/what-does-it-mean-be-poor