

# GLOBAL POVERTY STATISTICS AND CIVIL SOCIETY

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### Introduction

Statistics have a powerful presence in the arena of poverty reduction. On the one hand they are used to map trends and patterns in poverty, to try to understand the causes and consequences of poverty, and to judge the effectiveness of poverty reduction strategies. On the other hand they are employed in advocacy and campaigning to shock and to mobilise support for poverty reduction. Statistics retain a high status in the fields of policy and mass media, where they are traditionally perceived to be 'solid' in some way: credible, objective, transparent and a central tool in monitoring and evaluation. They seize readers' attention in policy documents as well as in newspaper headlines. But poverty statistics are notoriously controversial. They are open to charges of inaccuracy and bias at all stages of their production, from conceptualisation to data collection, data analysis, statistical summary and presentation. Critiques are all the stronger for poverty statistics that are pitched at the global or international levels with the aim of providing a common yardstick for tracking and comparing poverty rates across a broad range of cultural and economic contexts. This chapter is an account of the ways in which civil society actors engage with such statistics, as their users, producers and critics.

### What's the use of global poverty statistics?

#### The terms of the debate

Some take the view that the world would be a better place without quantitative data, adopting an absolute and extremist reading of the popular aphorism 'lies, damned lies and statistics'. Four responses might be given to such an attitude, with reference to global poverty statistics.

The first response is pragmatic: for some purposes poverty statistics are indispensable. At the most basic and immediate level, they are needed for aid and poverty reduction interventions, to gauge the nature and distribution of need, and to inform resource allocation. At a broader level, statistics constitute a central, though by no means exhaustive, tool for understanding poverty,

and thus for informing poverty reduction strategies. A prominent use of international poverty statistics is in assessing the relationship between economic globalisation and poverty (see for example Meghnad Desai's box in the Introduction to this volume), which has a major bearing on global economic policy and development programmes. The World Bank's iconic poverty headcount statistic – the proportion of people living on less than a dollar a day – has special status as the very first diagnostic indicator of the United Nations' Millennium Development Goals (MDGs). Quantitative data constitute a major source of evidence for a wide range of actors in the fight against poverty.

The second response is strategic: there is a predilection for statistics which can be put to good use. Quantification enjoys a certain 'scientific' authority in the policy world, and the striking impact of numbers can be used to tremendous effect in campaigning and advocacy. For the coalition of civil society organisations that launched the Make Poverty History campaign in 2005, for example, a key campaign slogan invited people to hear, see, and participate in clicking their fingers, to illustrate the statistic that 'a child dies as the result of poverty every three seconds' (Make Poverty History URL). Statistics have a value as effective, simple symbolic portrayals of complex phenomena.

This characteristic is their key weakness as well as their key strength. They are simple portrayals of complex realities: a statistic is by definition a summary of a certain feature of a set of data. Calculating a statistic is a selective exercise. In the context of global poverty statistics, moreover, statistics are not really simple at all. For example, the apparent simplicity and tangibility of the dollar-a-day poverty statistic belies the considerable complexity involved in its construction, and the many choices and compromises which have to be made at all stages of production, from collecting empirical information to combining data into a global measure. The dollar-a-day statistic has been the subject of a vociferous critique on the basis of these choices and compromises (see for example Reddy and Pogge 2010). Every revision and re-presentation of this statistic

is accompanied by commentaries from its creators as well as from its critics on the contingencies involved in its calculation, and their implications for monitoring the MDG target of halving poverty by 2015. Changes to the purchasing power parity conversion factor or the level of the poverty line used result in different assessments of the extent to which we are on track to meet this goal (Chen and Ravallion 2008). In a broader context, these statistics are used to defend or oppose international economic and political policies. Neo-liberals cite a negative correlation in developing countries between poverty headcounts and trade and foreign investment as evidence that economic globalisation benefits the poor. But this claim, of course, rests on the validity and reliability of the data; Wade (2004) suggests that the possible extent of error and bias in the poverty headcount data renders such a claim indefensible. So the third response is sympathetic: statistics can mislead and misinform, with serious consequences.

But the fourth response is apologetic. 'Lies, damned lies and statistics' is a fair warning against those cases where statistics are selected judiciously to emphasise certain features of a set of data while knowingly concealing other important features of it, and of the reality it is taken to represent. But if read, as it often is, as a statement about the inherent truth value of all statistics, it is methodologically naive and based on a fundamental misconception. To judge poverty statistics in such terms is to mistake the nature of social measurement, itself a subject with a long history of highly developed theoretical, philosophical and applied research.

Hand (2004) outlines the basic steps involved in constructing quantitative indicators. Before a statistic can be calculated, the phenomenon to be captured by it must be conceptualised and defined. This is necessarily and unavoidably done within some framework of understanding about the world in which it is situated. A scheme must then be selected or developed for representing the elements of that phenomenon by means of a system of numbers. Numbers work together in ways which have their own self-contained logic. Mapping the two together – an empirical relational system with a numerical relational system – is always a compromise. It always entails a number of theoretical and pragmatic choices (Hand 2004). What do we ideally want to find out from our statistics? What realistically can we find out – what are the possibilities and limitations of the data we can collect? And how about the substantive theoretical

framework of the 'world out there'? It may be highly and obviously politically charged, or apparently detached and neutral. A theoretical framework is, however, always in play, whether overtly or tacitly (Kanbur and Shaffer 2006). At the very least, researchers cannot escape drawing on the socially constructed knowledge they possess about the world, which comprises the scripts, schemas and heuristics that they use every day to navigate a path through it (this point comes easily to some social scientists – see for example Garfinkel 1967; Gigerenzer 1991; Poovey 1995; Schank and Abelson 1977).

Of course, convention and socialisation render some elements of theoretical frameworks about the world invisible. Whether and when this becomes a problem is an empirical question. But the crucial point is that social measurement is a process which is always to some degree political, sometimes with a small 'p', sometimes with a large 'p'. And poverty statistics are therefore never 'correct': as expressed in the dictum attributed to the statistician George Box, 'all models are wrong, but some are useful' (Box 1979: 202). It is meaningful and appropriate to judge statistics only in terms of their fitness for particular purposes.

### **Differences in perspectives are key**

Judgements about the fitness for purpose of poverty statistics are inherently tied up with judgements about the fitness of the purposes themselves, and all the more so when those purposes are strongly politically motivated. But even when an ultimate purpose is shared – poverty reduction being a prime example – differences in perspectives can be a key source of disagreements and debates about the evidence provided by statistics. This observation is made and insightfully illustrated by Kanbur (2001) on the basis of his experiences of directing the broad consultative exercise undertaken for the World Bank's World Development Report *Attacking Poverty* (World Bank 2000). Even when organisations and individuals agree on policy steps towards fighting poverty, progress is often hindered rather than enlightened by their different frames of reference, and Kanbur describes how these differences are manifested in the interpretation of statistics.

Broadly characterising the main types of actor involved, Kanbur describes a number of sources of divergences and conflicts in perspectives. One concerns levels of aggregation. Whereas the natural

tendency of those working in international financial institutions is to follow and focus on national or global summaries of poverty, the characteristic ‘civil society’ focus – in particular for NGOs engaged in grassroots community work or advocacy roles – is on the particular communities they represent. For example (and here we put to one side the technical details of the statistic), the incidence of poverty in Ghana overall fell between 1987 and 1991. This was good news from the perspective of those tracking national-level statistics. But the trend was not uniform across the country: poverty rose in urban areas during this period (Kanbur 2001). For NGOs working with the poor in Accra, the national trend had little relevance, and the claim that poverty had fallen during this time may have been unhelpful to them, or appeared a nonsense – or worse, a lie.

A similar divergence of perspective in the aggregation of poverty statistics is found between absolute and relative numbers of the poor. Economists would naturally tend to focus on ratios – that is, the proportion of a population living in poverty. For them, if the number of people defined as poor has risen but the overall population has risen by a greater margin, it is fair to say that poverty has fallen. But such claims of a decrease in poverty will make little sense to development and aid workers, who will have noticed only an increase in the number of poor people they are trying to help. The nature of their work demands that they think in terms of absolute levels rather than in proportions (Chakravarty, Kanbur and Mukherjee 2006), and statistics which describe ratios may even be actively unhelpful to their work.

Another fundamental divergence in outlook, Kanbur (2001) writes, is in the time horizons within which different agencies assess policy outcomes. Economists in international financial institutions naturally tend to focus on intermediate trends of around five to ten years. Civil society workers will tend to operate within either shorter or longer views. Those working with people in severe need will be concerned with the immediate impacts of policy initiatives, which may be damaging to families and individuals in the short term even if they yield benefits five years hence. In the worst-case scenario, medium-term benefits may simply arrive too late. By contrast, for NGOs focusing on long-term sustainable development and environmental issues, a time horizon of five to ten years is too short, and policies for poverty reduction (in particular those focusing on economic growth) must be framed within the long-term prospects of the earth’s natural resources. This long-term view is

tempered for financial institutions by the possibilities of advances in science and technology, whose impacts have historically been dramatic and far-reaching.

Differences in perspectives such as these are well justified in each case, and arguably of great informative value for the success of poverty reduction initiatives. It is a source of frustration to Kanbur that these different angles and focuses of interpretation so often give rise to mutual disengagement from dialogue by those working towards a shared ultimate goal. In the context of poverty statistics, the frequent result is that those whose currency is classical national-level statistics are dismissive of the ways in which civil society seems to misunderstand them, while civil society organisations protest simply that that statistics do not reflect reality or, worse, that they are manipulated for political ends.

But it is inevitable that the range of purposes, outlooks and emphases adopted by different actors will entail a range of theoretical models of poverty. A plethora of conceptualisations has been developed over many years; Spicker (2007) identifies twelve clusters of meaning in what is now a wealth of theoretical, philosophical, technical and empirical literature. How these concepts are operationalised – that is, captured by means of empirical data – is a central part of the literature. Different theoretical models often imply different approaches to operationalising concepts, and therefore lead to different statistics. Many quantitative indicators of poverty have been designed. The field of global poverty statistics can, however, be characterised by a number of relatively distinct approaches, each with its particular advocates and critics.

## Approaches to international and global poverty measurement

### Monetary measures

By far the most commonly used global poverty statistics are those which describe some aspect of income or consumption levels, as a basic indication of people’s capacity to provide for themselves. Gross Domestic Product (GDP) and Gross National Income (GNI) per capita are often used as rough proxies for drawing cross-national comparisons and trends in poverty. These and related statistics, including private consumption per capita, are derived from data from national accounts. In recent years, however, reliance has increasingly been placed on household surveys conducted variously by government statistics offices or branches of international organisations,

including notably the World Bank's Living Standards Measurement Study (Deaton 2003a). These surveys employ formal statistical methods to select random samples of households to represent the population of a country. Detailed questionnaires are administered to members of those households, posing questions about wages and other income and goods and services that they have obtained in a certain time period.

The precise formulation of a poverty statistic and the nature of its data source can have a considerable impact on the story it tells about poverty. For example, household surveys might be expected to give fairly straightforward information about income levels. But for some people – for example, subsistence farmers in rural areas of developing countries – monetary income may be largely irrelevant, or highly seasonally variable. Consumption can then be a better reflection of people's means – their access to food, shelter and other basic necessities. But this can be complex and difficult for survey respondents to report accurately. For example, changing the time period over which respondents are asked to recall their consumption patterns can result in quite different conclusions about poverty rates. In India, a recall period of one week produces a drastically lower poverty rate than a recall period of one month (Kakwani 2004). Using national accounts to calculate consumption levels does not solve this problem, since they themselves entail errors of different types; moreover, they can produce quite different figures from those derived from household surveys simply because they include different types of consumption (Deaton 2003b). The same is true of income levels calculated from national accounts versus household survey data. And the correlation between the estimates from national accounts and household survey data (how closely they are connected, and which tends to be lower and which higher) seems to vary systematically according to a country's wealth (Karshenas 2003).

Poverty statistics drawn from monetary data typically involve defining a threshold of income or consumption below which people would struggle to make ends meet. This threshold is termed a 'poverty line'. Its use dates back to the turn of the twentieth century and the pioneering studies of the living conditions of the poor in Britain, conducted by Charles Booth in London and Seebohm Rowntree in York (Gillie 1996). In these urban settings Booth and Rowntree defined their poverty lines as the minimum household income needed for its members to meet their basic physical needs,

primarily in terms of nutritional requirements. The key characteristics of this approach – defining a poverty line in *a priori* and absolute terms, on the criterion of subsistence, and operationalised in monetary value – have been replicated widely. National governments, particularly in former British colonies, have used poverty lines of this kind as central tools for identifying those in need and determining allocations of charitable and state welfare support (Townsend 2006).

In more recent times, however, governments – particularly in industrialised countries – have moved away from setting poverty lines according to some externally determined standard. Instead, they have tended to set poverty lines by referring to the distribution of income among the country's population. For example, the typical current practice among European governments is to set the poverty line at 60 per cent of the median income in the population. The national poverty line may thus rise or fall, depending on the distribution of income among all its inhabitants; if the rich become richer (all else being equal), the poverty line will be set at a higher value. A line defined in such a way implies that poverty is a relative rather than absolute state, contingent on the spread of income between all the members of a population.

A number of further statistics have been formulated by elaborating on this principle. For example, various versions of the 'poverty gap' statistic (Spicker, Álvarez-Leguizamón and Gordon 2007) are used to describe the situation of the average household below the poverty line. How far below the line is the typical household and, by implication, how far away is it from rising out of poverty? Are most people classified as 'poor' living in severe poverty or are most just below the line?

For all these refinements, the most common use of the poverty line is to focus simply on the estimated number of people living below it. Usually this is expressed as a proportion of the population as a whole. The best-known amongst these measures is the World Bank's primary global poverty statistic: the estimated percentage of people living on less than a dollar a day. The precise level of this poverty line has in fact been revised a number of times, from the original USD 1.02 (in 1985 prices) to its current level of USD 1.25 (in 2005 prices). The rationale given for the current threshold of USD 1.25 is that it is the average (specifically, the mean) of the national poverty lines for the poorest 15 countries in terms of consumption per capita (Chen and Ravallion 2008). This threshold is

then translated into other countries' currencies using purchasing power parity (PPP) conversion formulae, which are themselves derived from price surveys that compare the costs of a fixed bundle of goods in different locations. For each country, the proportion of people living below the USD 1.25 line, as translated into local PPP currency, is estimated. Finally, the country-level results are aggregated to the global level.

### Broader measures

Income- and consumption-based indicators are obviously narrowly focused, and are seen to serve a correspondingly narrow view of what poverty is, and by implication what policies should be used to tackle it. There are a number of alternative poverty measures, which cover a range of theorisations of poverty, but which all share the aim of moving beyond purely monetary definitions and beyond those limited to criteria of purely physical survival. Two schools of thought have been enormously influential in this line of research: Sen's framing of the issue in terms of capabilities (Sen 1983), and Townsend's concept of relative deprivation (Townsend 1993).

For Sen, living in poverty means lacking the basic capabilities required to be able to function at an acceptable quality of life. Capabilities are defined according to principles derived from political theory, and may include, for example, the ability or the freedom to have adequate nourishment, shelter, sanitation, education and so on. A capability may be exercised by means of different commodities. This means that, although poverty can be conceived of in absolute terms in the abstract, in everyday life it can be experienced in a variety of ways. It thus depends on social, economic and historical contexts, on the constraints and opportunities individuals face, and on the choices they make about how to meet their needs. Certainly, low income will deprive people of capabilities, but non-monetary factors will also play their part. The relative roles of these factors in shaping poverty will vary among individuals within a community, as well as more broadly across communities (Sen 1999).

The concept of capabilities fits well with a human development approach to poverty, and has been taken up in a number of poverty statistics with international or global coverage. UNDP's Human Poverty Index (HPI) (UNDP 1997) was conceived within this framework as a complement to purely income-based poverty measures. It combines information on the three capabilities of

longevity, knowledge and living standards, captured respectively by means of statistics on life expectancy, literacy, and health and sanitation. These indicators are chosen on the grounds that they are strongly affected by the quality of provision of public services, and therefore substantially moderate the benefit of private income to an individual's quality of life. A similar approach is taken by the NGO Social Watch in its Basic Capabilities Index (BCI) (Social Watch 2005: see Box 5.2 in Chapter 5 for more on Social Watch India). The BCI is also composed of the three dimensions of life expectancy, education and health, though it differs from the HPI in its details<sup>1</sup>. Both indexes are designed to be global in coverage and to facilitate comparisons both between countries and within countries where possible – at least in the context of a subset of capabilities which contribute to poverty.

For Townsend, poverty is defined in terms of relative living conditions: living in poverty means not having, or being denied, the resources to participate in social life as defined by current societal norms. A person in poverty is deprived in relation to a standard set by social convention or to a socially agreed level, and is excluded from society on these grounds. This understanding of poverty as culturally bound is far from being a radically new principle: Townsend points out that Adam Smith described some of the culturally prescribed standards which defined poverty in the eighteenth century. For example, in order to be employable, a labourer needed to wear a shirt (cited in Townsend 1993). Townsend's original study of deprivation in the UK (Townsend 1979) employed a household survey which asked about a family's diet, its provision of clothing, household amenities, and so on. A checklist of commodities could potentially be translated into the level of income needed to obtain them; the appropriate checklist could vary over time and between places.

Such inclusive and culturally sensitive definitions of poverty have received a great deal of support. In 1995 117 governments at the UN World Summit on Social

<sup>1</sup> *The HPI is a summary of the proportion of the population not expected to survive to the age of 40 years, the adult illiteracy rate, and a summary measure of standard of living calculated from the proportion of the population without access to clean water, the proportion of the population without access to health services and the proportion of children under the age of five years who are underweight. The BCI index is a summary of the percentage of children reaching fifth grade, mortality in children under five years of age and the percentage of births attended by health professionals.*

Development in Copenhagen agreed on a definition of absolute poverty couched in terms beyond immediate subsistence, and on a definition of overall poverty that is explicitly socially embedded and multifaceted<sup>2</sup>. The challenge arising from such a broad definition is, of course, how to harness it for calculating poverty statistics.

Multifaceted definitions of poverty imply multidimensional measures. The HPI and BCI are not the only composite poverty indexes; indeed, Sumner (2007) identifies 20, which vary in terms of their emphasis and scope as well as in terms of the mathematical techniques used to combine many variables into a single figure. These techniques include, for example, using patterns of correlations found in the data (via factor analysis or similar) to determine the weights to assign to each of the indicators, or defining such weights in advance according to theoretical prescriptions. Indexes can be used to score and rank countries, or thresholds can be set for each dimension, in a similar spirit to the single poverty line.

One of the most restricting factors in the development of non-monetary poverty statistics is the availability of appropriate data. The state of affairs varies a great deal between countries. A considerable number of national statistical offices, particularly in Latin America, employ a framework of Unsatisfied Basic Needs (UBN) in household surveys to gauge the extent of poverty in terms of income as well as water and sanitation, housing, education and so on. The UBN approach resonates with elements of both capabilities and relative deprivation conceptions of poverty, identifying needs beyond those defined in monetary terms, and couching them in formats relevant to the local context.

2 *The descriptions of poverty included the following: Poverty has various manifestations, including lack of income and productive resources sufficient to ensure sustainable livelihoods; hunger and malnutrition; ill health; limited or lack of access to education and other basic services; increased morbidity and mortality from illness; homelessness and inadequate housing; unsafe environments; and social discrimination and exclusion. It is also characterized by a lack of participation in decision-making and in civil, social and cultural life. ... Absolute poverty is a condition characterized by severe deprivation of basic human needs, including food, safe drinking water, sanitation facilities, health, shelter, education and information. It depends not only on income but also on access to social services' (United Nations 1995a: ch. 2, s 19).*

## **Different approaches, different strengths and weaknesses, different implications**

Every poverty statistic has merits and shortcomings, in both conceptualisation and practical execution. For example, many see monetary measures as conceptually too narrow, being confined to capturing poverty in only material terms, and usually setting a very low quality of existence as a threshold. In terms of practical execution, there are considerable complications and methodological challenges entailed in calculating poverty statistics using either national accounts or household surveys (see for example Deaton 2003b). Procedures for drawing international comparisons and for constructing global statistics are fraught with complications (Deaton 2003b; Reddy and Pogge 2010; see also the discussion below).

UBN and capabilities approaches have a certain advantage in constructing measures of poverty from a broader range of indicators. The most widely used statistics, such as the HPI and BCI, draw on a small number of standard and well-sourced socio-demographic data, avoiding the danger of making composite indexes too abstract or complex for popular appreciation. In doing so, however, they necessarily exclude from their models of poverty a number of factors which cannot be easily measured. Political freedom, for example, is central to a human development model of poverty, but fundamentally intangible and difficult to translate into empirical data (UNDP 1997).

Some index-makers are more adventurous with data sources, and use a large number of indicators (including data on expert perceptions and public perceptions) to capture those elements of poverty which cannot be directly observed. These indexes have the advantage of conceptual inclusiveness, but the disadvantage of entailing complex methodologies for combining indicators. Such methodologies rely on a series of weights or thresholds determined *a priori* or from the results of empirical analyses. Either way, the result runs the risk of appearing obscure to a non-expert audience, losing the transparency which is so valued in policy and advocacy fields.

With such a range of theoretical and empirical models of poverty, it is not surprising that these different international and global poverty statistics tell different stories about poverty. For example, at the country level there is only a weak correlation between income poverty and human poverty (measured respectively by the dollar-a-day statistic and HPI; Fukada-Parr 2006).

At the individual level, Ruggieri Laderchi, Saith and Stewart (2003) compared four measures of poverty applied to India and Peru, and found that they each identified different people as poor. So the choice of poverty statistic – be it for purposes of policy, advocacy or analysis – matters considerably.

In this context of heterogeneity, there have been many calls for convergence on a conceptual definition of poverty in order to support the development of meaningful comparable measures of poverty and so help us to understand and act on worldwide comparisons and trends (Townsend and Gordon 2002; UNDP URL). In practice, a two-sided convergence seems to be taking place: on the one hand a general agreement that poverty is a multidimensional concept, but on the other hand a general drift towards the use of money metrics to document it (Sumner 2007). Among money metrics, the dollar-a-day measure is ubiquitous. Its role as one of the MDG indicators may explain its dominance, but even as part of the full framework of 49 indicators for the MDGs it is the dollar-a-day that is used most often as a shorthand means of tracking progress towards the development goals (Fukada-Parr 2006).

What is civil society's role in this field? We have already noted the archetypal negative encounters between NGOs and producers of monetary poverty indicators, often resulting in their principled disengagement from poverty statistics. But this is only one part of a varied picture. Civil society actors do also engage with global poverty statistics, in a number of different ways. Among these there are many valuable contributions, with the potential for even more.

### How do civil society actors engage with global poverty statistics?

Civil society actors working on poverty are diverse in terms of their areas of focus, types of expertise and methods of operating. The ways in which they engage in the field of global poverty statistics are correspondingly varied.

At the most basic level, many of them are uncritical consumers and users of poverty statistics. This is a notable characteristic of many large international NGOs working on poverty reduction, which frequently cite MDG indicators (particularly the dollar-a-day) in their policy papers and campaign materials (for example, Oxfam 2008). The highly skilled press officers in these organisations fully exploit the power of such statistics and draw on their legitimacy as MDG indicators to mobilise support. For example, the Global Call to Action

against Poverty (GCAP), an extensive international network of organisations, made prominent use of such statistics in its global 'in my name' campaign launched in September 2008; its website states that 'there are more than 850 million people living in hunger, and more than 1 billion people living on less than one dollar per day' (GCAP URL).

But civil society actors also engage in critical, innovative and creative work in the field of poverty statistics. Some are statistical endeavours *per se*; some are investigations of unconventional data collection methods which may generate statistics, and some contributions are indirect products of other work programmes such as advocacy for particular disadvantaged groups. The magnitude and nature of their impact are varied, and there is not the space here to document all contributions comprehensively. In the following subsections I present some examples from three valuable types of input: engaging in methodological critiques of conventional statistics; developing alternative measures and gathering new data; and exposing and challenging the politics of knowledge as it relates to poverty statistics.

### Methodological debates on established statistics

One of the most important civil society contributions to the field of poverty statistics is in maintaining public debates about the validity and reliability of those statistics which are already widely used. Raising doubts, responding to challenges, and engaging in ongoing discussion about their technical details is an important activity in its own right. It is a vital channel for improving measurement methodologies, for scrutinising our understanding of the nature of poverty itself, and therefore for improving policies to address it (Grusky and Kanbur 2006). Popular statistics such as the dollar-a-day have a broad reach, but many of their consumers do not appreciate their complexities and pitfalls. Many, indeed, have no particular motivation to question them. Giving methodological discussions a public platform increases people's awareness that measuring poverty is complex and difficult, and in doing so raises the theme of poverty itself on the public agenda.

The dollar-a-day statistic is a good example. As the primary performance indicator for the MDGs it carries significant weight in policy and public circles. Part of its appeal to policy makers and poverty campaigners is its tremendous heuristic power: it seems to offer

a simple and straightforwardly defined poverty line. However, as mentioned, in reality its construction is a complex process. Changes to its technical details imply differing verdicts on global progress towards reducing poverty, which themselves imply varying verdicts on the success of policies to achieve that end. For these reasons a valuable contribution to the field of poverty statistics is an open debate on its methodology. Civil society actors, primarily academics, play a central role in maintaining the momentum and publicity of this debate, often in direct dialogue with the specialists from the World Bank who produce these statistics.

The considerable paper trail of discussion of the dollar-a-day measure covers a number of issues. For example, the academics Reddy and Pogge (2010) discuss the contingencies involved in converting the dollar-a-day criterion into local currencies. The World Bank's Ravallion (2010) responds to their points in the same edited volume. The conversion involves the use of PPP conversion factors derived from country-level price surveys. These price surveys cover a fixed bundle of goods, including basic commodities but also luxury goods and services. Reddy and Pogge argue that there is a key problem in deriving poverty headcounts from formulae which do not differentiate the consumption patterns of the poor from those of the rich. For example, all else being equal, falling prices of luxury goods may lead to an increase in the official spending power of a dollar-equivalent of local currency, and therefore to a decrease in the number of people counted as 'poor' – people who struggle to afford the basic necessities for survival, for whom luxury goods have little relevance. The PPP conversion factor needed for cross-national comparisons implies a similar averaging mechanism across a range of countries as well as types of commodity; so the poverty line in a developing country may move as a result of the spending patterns of the wealthiest people in the wealthiest countries.

The published literature on the dollar-a-day statistic addresses a number of other issues, including consideration of alternatives to a single international poverty line (Deaton 2003b); the implications of variations in data quality between countries (Reddy and Miniou 2007); and the contingency of results on the choice of PPP baseline year (Pogge 2008a). The recent revision of the dollar-a-day statistic to USD 1.25 (in 2005 PPP prices) on the basis of the latest and much improved consumer price survey (Chen and Ravallion 2008) prompted a considerable amount of interest and commentary (see for example Reddy 2008; Ravallion 2008; Pogge 2008b).

Written commentary and critique of poverty statistics has a significant presence in academic journals, which carry with them the quality assurance of the peer-review process. But additional material can be found in sites more amenable to a non-academic audience. Those with access to the Internet can follow a great deal of commentary and conversation among experts. For example, Pogge and Reddy post the details of their ongoing correspondence with Ravallion on their website Social Analysis (Social Analysis URL). The office of the Human Development Report ran an online forum between 2005 and 2006 on 'Measuring Multidimensional Poverty' (UNDP URL). The discussions that took place there between members of international institutions, national statistical offices, universities, independent research institutes and NGOs can be viewed freely.

Methodological debates do also take place in real time and space, and the programmes of some of these can also be followed online. For example, the Initiative for Poverty Dialogue (IPD URL), a non-profit organisation based at Columbia University, hosted in 2003 a workshop in which many of the key players in the poverty statistics debate participated.

Methodological critiques of poverty statistics have also emerged from civil society actors working with particular communities, who are concerned with the differential ways in which poverty affects them and are naturally prompted to question the level of focus which poverty statistics afford. Whereas commentators such as Pogge and Reddy query the technical steps used to aggregate poverty measures across countries, these civil society actors call attention to the ways in which they need to be disaggregated or broken down into smaller units, to understand poverty more fully.

For example, women's NGOs have been highly influential in the push to break down poverty statistics by gender, in order to generate quantitative evidence on the particular vulnerability of women to poverty. As one of several initiatives required to understand women's experiences of poverty, this need was put to the World Bank in a statement by the several hundred women's NGOs participating in the UN's Fourth Conference on Women in Beijing (UN 1995b). Progress towards the goal of improving statistical data on the gendered nature of poverty continues to be monitored, both by international agencies and by coalitions of women's organisations (UN 2005).

In this way, civil society actors working with particular

social groups play a vital role, by alerting a wide audience to important patterns and trends in poverty which may be hidden by the averaging effects of global statistics. Aggregate-level data may indicate no change over time in the incidence of poverty, while concealing evidence of increasing poverty among some groups and decreasing poverty in others. Such ‘churning’ (to use economists’ terminology) has important implications for policy, and can be revealed only when it is known that different groups might be differently vulnerable to poverty. Civil society groups working with particular communities are well placed to alert analysts to ways in which data should be disaggregated. It is in fact a potentially positive outcome of the differences in perspective between international financial institutions and locally focused NGOs that Kanbur (2001) describes.

### Alternative measures and new data

As well as critiquing existing statistics, civil society actors contribute considerably to the creation of new measures. Some of these efforts involve reconfiguring existing sources, while some involve collecting new data.

One of the most prominent re-uses of conventional data by a global civil society organisation is Social Watch’s Basic Capabilities Index (Social Watch 2005). The BCI employs country-level data sourced from the World Bank but steers away from monetary indicators to create a measure which is oriented towards a human development conception of poverty. It provides a valuable example of how indicators from the pool of existing data – data which are difficult and expensive to collect – can be fully exploited and used to reflect different models of poverty, according to the particular focus of any user group.

Within universities a number of research institutes are engaged in extensive empirical research, leading to new insights from existing statistics and to new indicators of poverty. Within the UK, for example, these include the Townsend Centre for International Poverty Research, housed within Bristol University (TCIPR URL), which has pioneered new international measures of child poverty based on household survey data focusing on health indicators (Gordon et al. 2003). The Oxford Poverty and Human Development Initiative within the University of Oxford (OPHD URL) devotes its research specifically to economic measures that are consonant with a multidimensional and human development model of poverty. Original quantitative research is also undertaken by umbrella organisations

such as the Chronic Poverty Research Centre, an international network organisation of universities, research organisations and NGOs (administered by the University of Manchester), which focuses in particular on the dynamics of vulnerability to poverty and its persistence over time (CPRC URL; Calvo and Dercon 2007).

Researchers, often university-based, also work on creating unorthodox poverty statistics. Many of these have resulted from developing novel approaches to data collection, particularly the so-called Q-squared methodologies, which combine qualitative and quantitative approaches. This is a relatively new field of research, and for the most part studies are confined to single countries or regions. Nevertheless, the discussions of the practical problems and intellectual tensions involved in them make for promising developments which can feed into the field of poverty statistics more broadly (Kanbur and Shaffer 2006).

One way in which novel methodologies have already contributed to comparative data on poverty is the significant number of poverty studies employing participatory methods. These were championed particularly in the 23-country comparative study (Narayan et al. 2000) which supported the World Development Report *Attacking Poverty* (World Bank 2000). Civil society groups play a vital part in this area of research. Participatory Poverty Assessments (PPAs) are now a central and standard part of World Bank and International Monetary Fund poverty reduction strategies, and routinely rely on collaborations with academic researchers and NGOs with local knowledge for their success.

To date, these studies have tended to be used to provide qualitative data alongside conventional statistical reports. They are conceived in large part to address the anomaly that it is the rich who define poverty and identify the poor: participatory research asks ordinary people to describe in their own terms the conditions of their lives, capabilities and needs. They provide a potential reality check against abstract quantitative indicators rather than being a source of quantitative data themselves (Robb 2002). It is widely assumed that creating comparable cross-national numerical data from such studies is unwise, much to the dismay of some researchers (Chambers 2002; 2007).

Participatory methods have attracted sharp critiques regarding their implementation, for reasons including scepticism about the representativeness of those who

are selected to participate, and about the misleading and partial results they can return when they involve normative presuppositions linked to poverty interventions. Like all methods, they are no panacea: in some cases they can provide valuable information on local details of the experience of poverty that is rich and reflexive, and sensitive to context. In some cases they, like numbers, can miss important features of the lives of poor people (Rew, Khan and Rew 2006).

There are, nevertheless, a few pioneering examples of work where all the benefits of participatory approaches are combined with the benefits of formal traditional data collection methods to produce undoubtedly better and more-accurate quantitative data for use in the field of poverty reduction. Barahona and Levy (2007) describe how they re-estimated rural population figures in Malawi using such a combination, as part of a poverty intervention to distribute packets of seed and fertiliser to families living on subsistence agriculture.

Formal statistical techniques were used to select villages on a probabilistic basis, using what survey methodologists would call multistage stratified probability sampling. With the use of simple random sampling, two villages were selected within each of 30 areas of Malawi; the areas themselves were selected randomly from eight larger regions, and the number of areas selected within each region was proportional to the spread of areas and the number of farm families in each region. These villages were then visited and local people engaged using participatory methods to generate a census of their populations. Common consensus was used to ascertain the boundaries of the village and to agree collectively on the definition of a household – a relatively fluid concept in rural Malawi. Social mapping exercises were used to draw the village, its houses, its landmarks and so on, the visual map enabling participants to cross-check their understandings and to agree on final population figures.

The results from these comprehensive studies were then scaled up, again with the use of formal statistical procedures and with registration data collected for the poverty intervention programme included, to estimate the rural Malawian population. The estimate exceeded the best available from the national statistical office, with all the consequences this implied for the intervention programme.

### **The politics of knowledge**

A central characteristic of the field of poverty statistics is the identity of the main source of the data. The

monopoly on global poverty statistics has for many years been held by the World Bank, with only a few ‘urban guerrillas’ in universities and UN groups (Wade 2004). This is not an ideal state of affairs. As a matter of principle, it is regrettable that there is a monopoly at all, that one organisation has such a strong influence on what we know about poverty via the data it collects and makes available. This disadvantage is all the greater when the monopoly belongs to a major source of finance, with its own distinctive political and economic agenda. In this regard, those academics who continue to engage World Bank representatives in critiques of their data play an important role as serious methodological sceptics of a dominant knowledge-providing organisation. In a similar way, Kanbur’s resignation as editor of the 2000 World Development Report, though never publicly explained by him, inevitably sent a message to observers about the Bank’s stance on policy and its relationship with independent research (Wade 2001).

Certain civil society actors have made remarkable efforts to challenge the status quo in the politics of knowledge. The European Network of Debt and Development (Eurodad), an organisation of 55 NGOs, invested a great deal of effort to bring to light data that are politically revealing, perhaps sensitive, and which might otherwise not be published. The struggles they faced while compiling the World Credit Tables 1994/95 are documented in Box 2.1.

At the local level, Levy (2007) also comments on national statistical offices’ current monopoly on data. She calls for a serious feasibility study of setting up locally situated and owned information centres. In her ideal scenario, these would be run day-to-day by community organisations in partnership with NGOs for training in data collection methods and analysis. National statistical offices would then oversee efforts in local centres, ensuring that a core set of comparable indicators (Levy suggests some of particular relevance to MDGs, including poverty, hunger, school enrolment and health) be collected in all local offices – or, if not all, then enough to generate a representative portrait of the country. It is an ambitious vision, but one grounded in a fundamentally pragmatic and principled stance on the rights that people should have to play a role in generating and managing the data that describe them, and which are used to inform policies that affect them (Osorio 2008).

There is a sense in which civil society and other

groups that work with poor people themselves offset the dominance of the statistical status quo in poverty research by providing the local detail which is lost in national and global level statistics, by making public what they know about experiences of poverty and the effects of policies on poor people's lives. It is a 'dirty secret' (Kanbur 2004) that poverty reduction policies have differential benefits for poor people. Typically, those people whose occupations or activities are encouraged or sanctioned by the policies of the donor receive maximum benefit from them. In other cases those in relatively weaker positions, who are arguably in greater need, can lose out. Following the poverty intervention programme for rural Malawian households described in Barahona and Levy (2007), Chinsinga et al. (2002) consulted local people in a number of villages to evaluate its accuracy in targeting those who most needed assistance. They then compared, across all the villages, the figures on those who had received the packs of seed and fertiliser with figures on those who were deemed by their peers to be most vulnerable to food insecurity. Errors of both inclusion and exclusion were found in the administration of aid – it had not absolutely accurately targeted those who were most in need. The empirical proof of these discrepancies provided the kind of evidence which could be used to petition for improvements in the fairness and effectiveness of poverty interventions of this kind.

It is not uncommon to see, as part of the presentation of new research methods and new findings, disappointed observations from researchers about the obstacles posed by political agendas. In Malawi, for example, Barahona and Levy (2007) found that the results of their study received a mixed response. The degree to which the findings were accepted by the authorities and by donors depended on the degree to which they were consonant with their political agendas. The critical comments on participatory methodologies cited above, by Rew, Khan and Rew (2006), arose from the unthinking application of a participatory rural appraisal carried out in northern Orissa. Implementing it as an 'off the shelf' methodology, uncritically, resulted in the exclusion of a variety of economic activities from research findings. In that diverse social and economic context, the data resulting from the study actually gave a partial (in both senses of the term) representation of poor people's lives: it missed some significant elements of their livelihoods, and it did so systematically.

Documenting complications and barriers of these

kinds is a valuable contribution to improving poverty research, quantitative or otherwise. Some of those who encounter such obstacles also have ideas for ways forward. Barahona and Levy (2007), for example, suggest that in their research more fruitful outcomes could be achieved through greater dialogue between agencies at the outset. Especially where the research methods to be employed are unfamiliar to those commissioning the research, and the results might be taken as undermining the authority of established data sources, there could be great value in building up trust between decision makers and researchers. Instilling a sense of ownership of the findings in those receiving the results of the research (rather than carrying it out) might encourage an open-minded approach to them.

### **Strength in numbers?**

Statistics are vital tools for understanding poverty and for taking action to combat it. They can inform and support poverty reduction, but they can also misinform and hinder it. Critiques of poverty statistics are crucial for maximising their potential to inform and support, and for minimising their potential to misinform or hinder. Debates along these lines encourage innovations to improve established statistics, redesign indicators and conceive of new types of empirical information and better data collection methods.

The process of measuring concepts – trying to operationalise them, going back and forth between theory and data – is a key strategy for trying to understand them (Kanbur and Shaffer 2006). Even the most qualitatively minded researchers recognise the utility of this sort of exercise. For example, Chambers (2007) comments from his experience of participatory research that being set with the task of trying to quantify a phenomenon forces one to be rigorous and methodical in preparation. Even if the outcome of trying to capture a concept with numerical data is to conclude that it cannot be done – and this is an important and informative conclusion in itself – the process of trying to measure will inescapably have increased one's understanding of the subject.

In the context of poverty measures, some groups of actors are naturally situated more closely to concepts and theories, while some are much closer to the 'world out there'. From their particular vantage points they can together contribute a full range of expertise to the field of poverty statistics. For example, civil society organisations and individuals who work directly with the poor have insights into the reality of poverty and the implications and

impacts of poverty statistics for those they are intended to help. By contrast, academics are typically best equipped through formal training for taking on the technical and methodological details of poverty measures. Each actor has his or her role to play, and it seems wise to capitalise on those skills. Levy (2007) comments from her experiences of mixed methods in poverty research that asking NGOs and national statistical offices to become experts in each others' specialities (in her example, participatory and statistical research methods respectively) tends not to be very successful.

Making the most of specialised knowledge should not mean leaving experts alone in their niches, however. Lack of engagement can dramatically reduce the success of apparently collaborative work. Barahona and Levy (2007) comment that governments and donors frequently delegate the task of choosing research design to independent advisers, but then respond sceptically to research results derived from research methods which are unfamiliar to them. Far from being a call to avoid novel research strategies, it is a call for closer collaboration between the people who work in the field of poverty who have different skills and experiences.

Kanbur (2001) bemoans the fact that different frames of reference adopted by international financial institutions and various civil society groups are a source of misunderstanding and tension. He exhorts academics to be more creative and flexible in their analyses – to take into consideration the complexities and nuances which are reported from those working closely with the poor. And he exhorts policy makers and implementers to abandon their rigid approach to statements of policy positions and public communications – to listen to the perspectives of others working in the same field, and to acknowledge the subtleties of their different experiences.

It seems logical and apt to end this chapter by extending the sentiment of openness and innovation, to encourage more civil society actors to engage with statistics. Critiques of statistics are ongoing and lively among specialists in financial organisations and academia. New statistics are created by university research institutes such as the Townsend Centre for International Poverty Research, and civil society initiatives such as Social Watch. However, the evidence suggests a lack of critical engagement with poverty statistics on the part of international NGOs, who use them primarily for their impact on mobilising public support and awareness of poverty campaigns. The informative and even emancipatory value of quantitative data on poverty can

be considerably enriched with the engagement of those with specialised knowledge and access to the people whom poverty measures are aimed to help. Triangulating information from the full range of vantage points offered by civil society actors can help to throw light on the implications of particular statistics, their deficiencies and their strengths. Alternative perspectives, far from being a barrier, can be a boon to making the best possible use of poverty statistics.

## Box 2.1: World Credit Tables: changing unfair rules of the games between creditors and debtors

The World Credit Tables (WCT) was a project of the European Network on Debt and Development (Eurodad – which I led from 1991 to 2003) in the years 1994/95 and 1995/96. When the statistical data were no longer made available to it, Eurodad published the qualitative information on creditors' positions and policies in publications like *Taking Stock of Debt: Creditor Policy in the Face of Debtor Poverty – Analysis, Creditor Profiles, Debtor Profiles* (Eurodad 1998). More than a decade later Eurodad, since 2004 led by Alex Wilks, is still pioneering the work on debt and development finance, as is reflected in regular publications on aid, debt and development finance (see Eurodad URL).

The objective of publishing the WCT was to incite global financial players like the IMF, World Bank and OECD, with their monopoly on the collection and management of data on debt (and loans and credit!), to publish data on creditor positions vis-à-vis developing countries in a similar way to the exposure of data on debtors to their creditors. The WCT project was never intended to continue as an NGO effort, but to challenge these global financial institutions to adopt the initiative from NGOs, making it their responsibility to publish data on creditor positions towards debtors as transparently and in as much detail as the converse: 'these World Credit Tables are an impetus to the World Bank and the OECD ... to produce the World Credit Tables themselves in the future' (Eurodad 1995: 3).

We invited the responsible staff and leadership of the World Bank, the IMF and the OECD to take up this challenge, but they referred us to our governments, who, they said, should make the relevant decisions. When we requested our governments to do so, they declined, referring us back to the relevant institutions as the owners of the information on creditors and debtors. Faced with deadlock, we brought the situation to the attention of leaders of the institutions in the succeeding years. Almost a decade after our original request we wrote to the leaders of World Bank, the IMF and the OECD, asking them why disaggregated data on creditor positions had still not been made available to the public. No response has so far been forthcoming. The OECD and World Bank nowadays operate a so-called Creditor Reporting System, which sounds as if it supplies disaggregated official information on creditors for debtors, but in fact is a reporting system on aid, not on loans and debt.

It was explained to us that it was not in the competitive interest of creditor governments to make themselves transparent to other creditors. As well, governments of developing countries could apparently 'abuse' such information by citing it in their negotiations with creditor governments and bodies like export credit agencies. One could understand this argument if it applied to private creditors, who have an interest in commercial confidentiality vis-à-vis competitors in the banking sector. But the unprecedented financial crisis that began in September 2008 has shown that transparency in banks and insurance companies is crucial. Everyone understands now how important openness and transparency of even commercial banks and financial institutions are for preventing future financial crises and protecting vulnerable (groups of) lenders. The ongoing non-transparency of official creditor information implies that debtors and other victims of bad lending, let alone the general public, will not be able to hold creditors accountable.

So, with the help of the WCT, Eurodad enabled Southern governments, parliaments and publics to assess the strengths and weaknesses of creditors. As we wrote in 1995 (Eurodad 1995: 3), the WCT

*is a modest effort to present the other side of the coin. In today's world we are allowed to know everything about the position of debtors: how much they owe, under what conditions, how much they pay back, when they default etc. We are just not allowed to know how much they owe to whom ... For instance, if we want to know how much Tanzania is obliged to pay its creditors, we can find public information on debt stocks and annual debt service (and much more specific information) to bilateral official creditors, commercial banks and multilateral institutions as groups but any further disaggregated information on the specific creditors is not available.*

This does not mean that such disaggregated information does not exist. On the contrary, the World Bank's Debt Reporting System receives information from developing debtor countries, including all the information on its creditors. Moreover, creditor governments report to the OECD. Both institutions make these data and statistics available in disaggregated form relating to each individual debtor, but do not disaggregate the data by creditor.

As we pointed out in the editions of the WCT that were published in the 1990s, the creditor institutions' failure to respond to a reasonable request like this reflects financial–economic power relations, which exist as much today as they did then: debtors are to be exposed in detail, creditors have the power to avoid such treatment for themselves. As Richard Jolly, then Special Adviser to the UNDP Administrator on the Human Development Report and responsible for the influential publication *Adjustment with a Human Face* in the mid-1990s, wrote in the Foreword of the WCT 1996 (Eurodad 1996: iii):

*It provides the missing link in the range of publications of official institutions. Instead of debt data mainly concentrated on the debtor countries, EURODAD with great effort has compiled profiles and statistics on the creditors, information that too often is jealously guarded as an official secret.*

As if foreseeing the financial crisis of September 2008 in the US, when in a few days a rescue package of USD 700 billion was put together to save the biggest US financial institutions (like AIG), Jolly also observed:

*But can any one doubt that much more rapid international action would have been taken, if the tables have been reversed? If it was the industrial countries who were the severely indebted and in need of international action and support, would it have taken so many years to take decisions and implement them? It surely would have been a matter of a week, perhaps a month or two.*

Indeed, in the Preface of World Debt Tables 1994–5 (World Bank 1994) Rudy De Meyer, the chair of Eurodad, and I concluded that information on developing countries' debt reflected global power relations. We quote once more Richard Jolly:

*The goal of encouraging more rapid and effective action is the purpose of this important publication. It lays out the other side of the debt equation – who the creditors are, not just who the debtors are. It is a step towards greater transparency and accountability. Let the facts be known – so citizens in all countries can demand and expect the action that is so clearly needed, from all parties and at a more rapid rate.*

The publication of the tables on creditors was accompanied by an analysis of creditors' positions and policies and a number of other important issues for development finance.

What was it that we did a decade and a half ago? We turned the World Bank's debtor database into a creditor database. After 1996, we were no longer able to provide the information because it was discovered that we had 'smuggled' the database out of the World Bank. It caught the Bank's attention after I had agreed with the then Vice President of the Bank and its acting head of communications that we would present the WCT 1995/96 to James Wolfensohn, President of the Bank, at the end of his major press conference during the annual general meeting in 1996. We produced a nice, glossy publication, mirroring in colour and print the World Debt Tables (published a year later as *Global Development Finance 1997*). Soon after I had presented a copy of the WCT to the Bank's Vice President, he informed me that the proposed presentation of the WCT to Wolfensohn could not take place. Later we heard that the Bank had even hired a detective to find how we had obtained the data – something that was never discovered.

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*Ted van Hees, Eurodad Coordinator 1991–2003*

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