Conceptualizing social exclusion in the context of India's poorest regions: a contribution to the Qual-Quant debate

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Q-Squared Working Paper No. 39
June 2007

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1. Introduction: Quant-Qual, social exclusion, and social sciences

This paper, originally prepared for the second Qual-Quant workshop in Toronto, presents an analysis of poverty in Orissa, particularly in the most remote and poorest part of what is now India's poorest state. In doing so, it uses a concept of social exclusion, in an attempt to bridge the gap between *describing* and *explaining* poverty. This paper builds on an earlier empirical paper, and draws out the methodological implications of the approach proposed there (de Haan and Dubey 2003), focusing on, and incorporating different methods, from existing data sources, in a way – I will argue – that is not sufficiently captured under the Qualitative-Quantitative (or Q-squared) distinction which has become a central theme in poverty- and development studies.

The argument regarding the notion of social exclusion and how it can contributes to the Qual-Quant discussion builds on five observations regarding this discussion. First, it is important to highlight that the Qual-Quant distinction does not overlap a distinction between economists and non-economists. In traditions of sociology, quantitative and qualitative methods were equally important instruments in the social science enquiry.[1] In fields of enquiry in social psychology and even social history (which is more tied to the nature of its sources) this appears the case too, and in textbooks in sociology research methods, the qualitative-quantitative distinctions is regarded as formative for the social sciences.[2]

Second, the Qual-Quant discussion has its origins in debates that have emerged out of the World Bank, with its critical but engaging audience including at other donor agencies. It is situated in the context of increased acceptance, during the 1990s, of participatory approaches to development planning and management (Narayan 1994), and the critique of household surveys as they were implemented under the Social Dimensions of Adjustment.[3] This has led to a certain amount of isolation from wider social science debates,[4] and has helped to shape this distinction into an economist versus non-economist schism.[5] This is important for the way this debate can be taken forward, because it is as much about acceptance and understanding fundamentals of other sciences, as just the various methods.[6]

Third, and related to the way this debate has originated and where it is situated, the debate has been driven by methods rather than the problems they are supposed to help address. During a small seminar at DFID around the same Qual-Quant thematic, a NGO representative pointedly remarked that poor people are not concerned with methods used, as long as research helps to put their case in the vision of policy makers. The debate in the UK during the 1980s and 1990s about increasing inequality is a case in point. My own interest in the data presented in the paper was very much driven by an aim to understand the public policies that shaped the nature of poverty (and inequality) in

Orissa, and how to influence this within and outside my organization, rather than an interest in methodological debates.[7]

Fourth, and related, though situated in the debates around the impacts of policies and structural adjustment in particular, the impact of policies has for long remained marginal to many of the debate on poverty measurement, and vice versa. The work by Sahn et al (1996)[8] for long remained one of the few that made policy impact the core of analysis (now with the ascent of Poverty and Social Impact Analysis this is changing significantly (Coudouel et al. 2006) – though still not influencing the poverty methodology debates. Arguments regarding ability to trace policy impact on well-being are usually absent from debates on methods.[9] There still seems to be merit in the long-standing claims that the kind of poverty analysis promoted has been rather directly related to a residual approach to poverty reduction, exemplified by the safety nets approach of the 1980s and 1990s.[10]

A final and more practical introductory point – related to the comment above on the donor-driven nature of the debate – relates to availability of sources, of course greatly informed by having worked in India and be spoilt with available data, tremendously disaggregated,[11] and increasingly available for large numbers of researchers, and through official websites. Not just in India, however, I would argue, more attention need to be paid to existing sources and existing strands of social science research, and relatively cheap and possibly more sustainable ways in which these can be exploited to help understand deprivation.

Thus, in the way I employ the notion of social exclusion, the key point is not an alternative definition of poverty (with reference to specific 'excluded groups'), nor an innovative set of research techniques and methodologies, but rather a return to more traditional social science debates and methodologies. This emphasizes the processes and societal relations that determine deprivation. For this purpose, the rest of this paper is structured as follows.[12] Section 2 briefly summarizes the way the notion of social exclusion entered the debate of development studies, and the extensive critique of the concept, and when it may be a helpful notion, and when not. Section 3 focuses on information derived from the Indian National Sample Survey, which focuses on trends in poverty, particularly the increasing differences between Orissa and the rest of the country, regional disparities within Orissa, and disparities between social groups. The following section focuses on human development indicators, again from existing and mostly nation-wide surveys, related to education and various health indicators. Section 5 discusses indicators of and data sources regarding participation and voice, arguing that in this context they are an integral part of deprivation, as well as for the reasons of limited success of programs and policies that have aimed to address poverty and disparities. Section 6 focuses on discrimination, its statistical understanding as can be derived from existing surveys (in the case of social groups and gender within Orissa), and emphasizes the need for understanding the social processes, attitudes and practices that are responsible for the continued deprivation, and the methodological implications and

complexities. Section 7 concludes, highlighting different ways in which poverty analysis can be approached and the added value of the approach discussed in this paper.

2. Social exclusion: the concept

Prompted by debates in Europe on new forms of poverty in the wake of the crisis of the welfare state, development studies in the 1990s started to explore the notion of social exclusion. It was promoted by a research project at the International Institute in the mid 1990s (IILS 1994, Figueiredo and de Haan 1998), originally as contribution to the World Summit for Social Development, which produced a range of country studies. An IDS Bulletin in 1998 focused on the subject, with an emphasis on bringing together northern and southern debates on poverty (de Haan and Maxwell 1998), the notion reappeared in the writings of Amartya Sen for the Asian Development Bank (1998), at the conference on chronic poverty at the University of Manchester in 2003. In Latin America, particularly in the Inter-American Development Bank, social exclusion and inclusion has become a core concern, against of course very high levels of measured inequality, and concerns around race and ethnicity (e.g. Buvinic et al. 2004). It has appeared in discussions in China too, related to government debates and policies to promote a 'harmonious society'. Common to most of these writing is a definition that emphasizes: a) poverty as a multi-dimensional phenomenon, and b) the institutions and processes that are responsible for causing and reproducing deprivation.

As could have been foreseen on the basis of the important conceptual work by Hilary Silver,[13] interpretations of the concept have differed greatly, and there may have been more conceptual critique than empirical applications of the concept. Silver distinguished three paradigms of social exclusion, depending in particular on the ways social *integration* has been conceptualized, and associated with concomitant 'theoretical and ideological baggage'. In the 'solidarity paradigm', dominant in France, exclusion is the rupture of a social bond between the individual and society that is cultural and moral. The poor, unemployed and ethnic minorities are defined as outsiders. National solidarity implies political right and duties. A 'specialisation paradigm', dominant in the US, and contested in the UK, is determined by individual liberalism, emphasizing the contractual exchange of rights and obligations. According to liberal-individualistic theories, individuals are able to move across boundaries of social differentiation and economic divisions of labor. In this paradigm, exclusion reflects discrimination, the drawing of group distinctions that denies individuals full access to or participation in exchange or interaction. A 'monopoly paradigm' is influential in Britain and many Northern European countries, and views the social order as coercive, imposed through hierarchical power relations. Exclusion is defined as a consequence of the formation of group monopolies. Group distinctions and inequality overlap.[14]

These paradigms as formulated by Silver help to contextualize and understand debates about deprivation.[15] It helps understand *why* definitions of social exclusion vary (and

indeed of 'inequality'), and that the reasons for this can often be traced to political and intellectual traditions. Arguably, this is a key reason why a concept of social exclusion *can* be usefully applied in the context of the South, a context where absolute deprivation is much more widespread. A Durkheimian emphasis on social solidarity is relevant, conceptually, across a range of situations, and social exclusion can usefully be defined as "the process through which individuals or groups are wholly or partially excluded from full participation in the society within which they live".[16] A social exclusion concept should help us understand the nature and causes of deprivation, in a way that takes context dependence as one of its key starting points.

The various ways in which social exclusion has been (and can be) interpreted are of relevance for our debate, particularly to help better understanding of different disciplines and traditions.[17] I highlight two, most relevant for the debate here. First, whereas interpretations of social exclusion like in the research in France by Paugam emphasizes income deprivation as part of social exclusion,[18] it seems that an Anglo-Saxon tradition continues to define the two as distinct or independent. This is illustrated in the common question whether social exclusion is responsible for or a cause of (income) poverty (which, in the first interpretation, of course is impossible to answer, as it is part of the very phenomenon), and highlights not so much a quantitative-qualitative methodological distinction, but a continued debate regarding the multi-dimensional nature of poverty.[19]

Second, social exclusion can be equated with a notion of relative deprivation, which can be quantified (e.g. income share of bottom 20%).[20] In a broad social science perspective, however, while important for understanding exclusion, such a quantitative description is not the same as understanding the social processes and institutions that are responsible for deprivation.[21] Before discussing analysis of such social processes, the next two sections focus on quantifiable indicators, of income poverty and human development, and the richness of information that existing data provide in the Indian context.

3. Income poverty, and regional and group disparities

Analysis of income poverty in India draws on NSSO data, particular its regular consumption survey (a large sample is collected every 5 years, and a smaller sample annually). There has been much debate regarding the quality and comparability of particularly the 1999/2000 survey; this has been well explained in Deaton (2003), and both uncorrected and corrected data are available. These and other articles emphasize the sensitivity of estimates to price indices, which has been shown to greatly impact regional and rural-urban comparisons. However, the intensive debate in India regarding reliability of data may be a sign of strength rather than weakness: the long history of surveys has helped probably to get much more reliable estimates, and the wide engagement of researchers has of course led to much constructive critique and probing questions (absent or at last much weaker in many of the debates on household surveys in Africa).

State level income poverty data reveal that in 1999/2000 Orissa had become India's poorest state, surpassing Bihar that was still the poorest in 19993/94 but showed a substantial decline in poverty during the late 1990s. Orissa's poverty headcount stagnated around 48-49% between 1993/94 and 1999/2000, while at all-India level the headcount declined markedly, in Andhra Pradesh poverty halved, and even MP showed a decline of 5 percentage points. Orissa's trend of falling behind the Indian average has a longer history, but is particularly marked during the 1990s, providing very important questions regarding India's development trends.

The income poverty data allow for regional disaggregation, which gives a rather different picture of poverty within the state. It uses the level of NSS-regions (which surprisingly few studies have done), dividing Orissa in a coastal, southern and northern region. These data show a remarkable picture. While rural poverty in Coastal Orissa was 32%, it was 50% in Northern Orissa, and a staggering 87% in Southern Orissa. The picture of urban poverty shows a mixed picture, with relatively high urban poverty in coastal areas, in comparison to the rural area, and without significant differences across the three regions. Comparison over time shows that regional differences have been rapidly increasing: during the 1990s coastal Orissa experienced a poverty decline comparable to the all-India average, but the headcount in the southern regions showed a remarkable increase. The reason for this divergence is not clear. [22]

NSS data further allow for analysis of levels of poverty among social groups, with Scheduled Castes (Dalits) and Scheduled Tribes (Adivasis) particularly disadvantaged ('Other Backward Castes' and 'Minorities' are further important categories).[23] At all-India level, average per capita income of SC/ST at all-India level is about one-third lower than that among other groups. Headcount poverty among other (non-deprived groups in 1999/2000 was 16%, 30% for minorities (Muslims), 36% for SC and 44% for ST. In Orissa – where 23% of the population is classified as ST, and 16% as SC – poverty incidences of ST (72%) and SC (55%) are well above that of 'other' groups (33%). The differences between STs and others are larger in rural than urban areas, and slightly larger in Orissa than in the rest of India. Poverty incidences have declined more rapidly among other groups (23 % points) than among STs (a mere 14 % points), and even SCs (20 % points). As poverty in particularly the southern part of Orissa is extremely high, and these are the areas where concentration of STs is high, the deprivation of STs may be caused mainly by their location; nevertheless even in southern Orissa the incidence of poverty among STs is higher (92%) than among others (still very high at 78%). These data, of course, reflect significant questions around identity, within a context of widespread poverty.[24]

NSS data, as many household surveys, do not allow for disaggregation within the household, and hence for gender. The category female headship gives some indication, though far from perfect (it is no coincidence that evidence regarding links between female headship and poverty shows so much variation, as IFPRI research has

highlighted). NSS data (de Haan and Dubey 2003) show no significant correlation in Orissa between female headship of households and poverty, though primary data collected by Panda (1997) show that in rural Orissa female headship is closely linked to poverty and child disadvantage.

These levels of poverty in regions and among group are remarkable, but the conclusions need some disclaimers. First, as indicated above, NSS data have generated much debate, and analysis by Deaton has shown that comparisons are sensitive to price indices (particularly in rural-urban comparisons). The picture regarding high levels of poverty in the South may be influenced by this, and the extent to which household surveys capture well-being in a forest economy deserve more scrutiny, though analysis by Panda (2003) using a more accurate cereal price indicates that poverty in the Southern region would still be 2 two and a half times that in the Coastal region.[25] Second, the above figures focus entirely on proportions of people in poverty. As the population density is much higher in Coastal areas, the numbers of poor people there remain very substantial despite lower headcounts; in fact, all three regions have about 5 million poor people each. Third, even at the levels analyzed we need to take account of differences within regions, and continue to emphasize that inequalities are likely to be significant at micro-level and within the social groups discussed.

Despite these disclaimers, there is little doubt that these data are crucial for understanding deprivation, in this case the disparities within India, and lower-level disparities within Orissa and between social groups. In India's federal democratic structure, both inter- and intra-state disparities throw up essential policy questions. It is worth highlighting how much our understanding of poverty is helped by the comparisons, with other states, within the states, across social groups, and over time. Moreover, the understanding derived from NSS data is greatly enhanced by availability of a range of other indicators, proxies and correlates (though not all available in all rounds). For example, poverty can be correlated not only with social groups, but also with sector of employment and nature of labor (e.g., casual labor being an important income source particularly for SC, and closely associated with poverty). Wage data from the NSS survey form a possible proxy for poverty measurement, particularly for agricultural wage workers and casual urban labor. Data on landownership are also available, though not with the same frequency and quality, suggesting for Orissa important causes of high levels of deprivation in the late 1990s. Education data, age-specific, can help to get a view of future trend in income disparities for example between social groups.

The methodological point for poverty research is a simple one. Existing Indian data can be exploited very easily and cheaply to provide a very wide range of indicators of well-being. The debates on the quality of data are important, but also a healthy sign of the interest in and importance of the data. The data are very important for policy purposes and debate, including for allocation of fiscal resources, and providing basis for analysis of causes of high levels of poverty, for example related to levels and patterns of economic

growth. Finally, the 'money-metric' lens of household surveys can help rather than hinder focusing in on – though not by themselves explaining – some of the key processes responsible for the high levels of disparities in Orissa.

4. Human development

Though perhaps not sufficiently entering debates on 'poverty', in India an enormous amount of human development data are available: education data particularly from the Census and departmental statistics, and health-related indicators from NFHS (2 rounds so far, during the 1990s), [26] and the Sample Registration System, with triangulation between sources possible and often providing important information. These data can be compared over time, across regions, and particularly the Census of course allows for detailed disaggregation and comparison over time. Following an emphasis on the multi-dimensionality of deprivation, this section shows the analysis of well-being and deprivation that is possible on the basis of available data, ending with thoughts regarding overlapping forms of deprivation in India's poorest regions, and the potential policy implications of such findings.

The Census provides detailed information on literacy rates at district level (and below, and these data are increasingly available on the official Census website). In 1991 49% of Orissa's population was literate, and this increased to 64% in 2001. In 2001, literacy levels in the southern districts remained around 30-35%, and female literacy below 25%, while the levels in Khordah, Cuttack and Puri rose to around 80%. Data allow for calculations of trends, including regarding disparities: in Orissa the 1990s showed a very small decrease in the regional disparities (calculated as relative to the average).

Second, health indicators are also available at district level, though not as reliable and easy to disaggregate as education data. These show infant and maternal mortality in Orissa are well above the Indian average, though showing substantial decline during the last decade. Infant mortality data, from the Sample Registration System, have been disaggregated below state level, but only to region, showing lower than expected regional differences. Data on the percentage of women receiving skilled attention during pregnancy, however, show very large regional inequalities, whereas the data on child immunization show somewhat more moderate inequalities.

In education, while differences between India and Orissa are small, the differences across social groups are very large – though even 27% of the not-deprived groups in rural coastal areas are illiterate (and 17% in urban areas), 82% of the ST population in the southern areas is illiterate. According to NFHS-2, 88% of the female tribal population, 73% of the scheduled caste women, 56% of other backward caste women and 34% of 'other women' were illiterate.

These data encapsulate information on gender differences – which given the absence of data on income poverty is even more crucial. On education, both Census and NFHS data provide detailed disaggregated information. Census data show female literacy increasing from 35% to just over 50% between 1991 and 2001, but disparities between men and women in 2001 were still about 25 percentage points, and only marginally declined from 1991 (despite existence of targeted education programs). The data allow analysis of differences in gender disparities in poorer and better-off regions, and in the case of Orissa these appear to be remarkably stable. Health indicators also highlight the considerable disadvantages women face. Maternal mortality is extremely high in Orissa and well above the Indian average, though showing substantial decline during the last decade. Data on percentage of women receiving skilled attention during pregnancy again emphasize very large disparities across the state (eg 10% in Malkangiri versus more than 50% in some coastal districts).

For understanding the causes of deprivation, and for policy purposes, it is important whether different indicators of deprivation are correlated, i.e. whether areas with high income poverty also suffer from deprivation in education and/or health. This can be done at district level, showing for example some degree of correlation between levels of income poverty, illiteracy and IMR, and levels of female illiteracy to correlate fairly well with the percentage of women that receive no skilled attention during pregnancy (suggesting strong and overlapping forms of gender disadvantage). At personal level also, disadvantages appear to accumulate. For example, a tribal person in a remote region has the highest likelihood of being in poverty (about 90% in Orissa), and given the independent effect of education, an unskilled tribal person would have an even higher likelihood, as would a woman (though no income data are available).

Whether disadvantages are multiple matters for policy implications. At the district level, analysis suggests that in districts with more poor people, health and education services have worse performance. Given the classic findings of Kerala, Sri Lanka and Cuba which have had good human development indicators are low levels of income, or the experience with provision of education to poor communities in Rajasthan, this was not self-evident. The analysis thus might suggest that the public policies in Orissa need to be paying much more attention to deprived districts or regions, across sectors. At household level, the analysis might suggest that there is a need for an inter-sectoral approach to combating deprivation, where improvements in health, education and access to income generation are all important.

Finally, the question of overlap of disadvantages is and remains an empirical one, specific to context and form of disadvantage. For example, analysis of sex ratios across India, and recently within Orissa (Agnihotri 2002), shows that discrimination against girls usually happens in better-off parts in India and, more recently, in better off urban areas in Orissa (and possibly among better-off groups, and not for example among many tribes though their human development indicators fall far behind the average). The

methodological conclusion from this, which I come back to in the concluding section, is that in-depth and localized study of deprivation remains crucial.

5. Voice and knowledge

The analysis of poverty in Orissa, and my work in a development agency, made me look into the possible explanations of the disparities, between Orissa and the rest of India, and between regions and groups within Orissa.[27] In particular, it struck me how remarkable such disparities are given the large number of government programs for poverty alleviation (and funding, particularly for food security and education), and aims to reduce disparities. Against the considerable efforts towards universalizing primary education over the 1990s, the gaps as shown in the official data are very significant. Similarly, the continued disparities between social groups and gender are striking in the light of the many government and non-governmental efforts to address those. And, again, the fact that disadvantages overlap point to an additional element of the functioning of public policies. Hence, and relevant for understanding of what poverty analysis needs to contain, an exploration of such programs and impact are essential.

As hypothesis, I put forward that the relative lack of effect of programs is related to absence of 'participation', in particular the effective voice that people exert in the programs that matter most for their well-being. A first question this throws up is which are the programs that matter most for poor people. The NSS surveys provide information on only three kinds of programs, though important ones like PDS.[28] An alternative source of information for the purpose exists in the participatory study of PRAXIS,[29] which asked poor people's perceptions of the most important public institutions, and their performance. The most important one, the Panchayat – the lowest level of democratic governance, which in India has been fairly recently established, and is known to be weakly developed in Orissa – was also the most corrupt. Institutions related to health and education unsurprisingly were high on the list of most important institutions of poor people, and access and performance was mixed – a picture that is shown as well in a range of official evaluations and advocacy-oriented studies.

For effective participation, knowledge no doubt is essential, and in a poverty analysis knowledge ought to be incorporated both for its 'intrinsic' as well as its 'instrumental' value. In the case of Orissa, a key source is available from a study by the Centre for Development Studies, a survey, of poor people's perceptions, carried out by a centre that does much work in election monitoring and analysis. This showed a range of issues of relevance for the complexity we try to understand. First, the survey showed that poor do take a great interest in the political system, as indicated by high voter turnouts; but their knowledge is very limited, and disparities in knowledge are as large as on other indicators. Though many people could name the sarpanch, only 22% of the 'very poor' (categories were defined for purpose of the survey) could name the country's Prime Minister (against 78% of the upper class), and 39% their MLA. Exposure to media is

extremely limited: only 6% of the very poor read newspapers, and only 17% listen to radio. NFHS data too contain information on media, showing 84% of Scheduled Tribes is not regularly exposed to any media.

Further, for understanding effective voice and spaces for participation, to understand Orissa's complexity the following studies were of help, and pre-conditions for a good poverty analysis as proposed here. First, research on political regimes in Indian states – like Harris (1999) – has shown the continued traditional social and economic dominance, in Orissa's case continued Brahmin and coastal based groups, and weak roots of politics and in society, which for example helps to explain continued discrimination and weak representation of interests of non-coastal areas. Second, analysis on the effective functioning of decentralization shows that the responsible institutions are weak, that elected functionaries have little understanding of roles and responsibilities, and – as indicated - that local governance is often corrupt. MLAs for example have continued to exercise patronage and control over decentralized systems of school management. Finally, it is generally recognized – and essential for understanding space for exerting voice but not well documented– that civil society is weak in Orissa, though many organizations work effectively among the poorest groups and in most remote regions. Few cases of strong advocacy exist, and where such advocacy has occurred policy debates have become polarized. Press reporting in Orissa also tends to be weak on reporting on social issues, and regular reporting on hunger deaths may not substantively contribute to accountability.

To reiterate, and stress the relative emphasis of a social exclusion approach, the lack of representation in and knowledge of the political and administrative systems themselves can be regarded as one of the elements of deprivation. The lack of 'voice' is part of an explanation why government policies have not been more effective in reducing poverty. Further exploration into the social relations behind the observed disparities, as discussed in the next section, may shed further light on the causes behind these failures.

6. 'Discrimination'

It is remarkable, and in itself relevant for the argument in this paper, that few of the international poverty debates have raised issues of discrimination. Rosalind Eyben's work stresses how difficult it appears, for development agencies at least, to talk about inequality, discrimination, and racism (Eyben and Lovett 2004). Prof Thorat, JNU (pers. comm..), has been concerned how few of the *economists'* analyses of poverty among social groups raise the issue of caste discrimination – remarkable if for example compared to the extensive quantitative debate on race (very similar, in many respects) in the US. This section focuses on discrimination as a key component of processes of exclusion, by referring to studies that show how this can be approached statistically on the basis of existing surveys, and emphasizing the need for understanding the social processes, attitudes and practices that are responsible for the continued deprivation, and

the methodological implications and complexities. It focuses on discrimination of social group, with some reference to gender.

Descriptive trends of disparities between social groups in India suggest how stable such disparities have been, again remarkable in the face of extensive programs to address them. Estimates of changes in average consumption and poverty headcount among the different social groups between 1983 and 1999/00 suggested that the differences did not change much, and depending on the indicator chosen the differences narrowed or increased slightly. Our analysis also suggested that the trends varied greatly across states (e.g. in AP and MP the trends for ST being much less favorable than for others). Knowledge of such trends, often absent in the poverty studies across the South, help to highlight the need to 'understand' the disparities, as a durable phenomenon.[30]

Understanding reasons behind these trends can be supported by identifying or isolating the independent contribution of social-group membership to the probability of being in poverty, illiterate, or bad health. Two World Bank studies using NSS data in India focused on the returns to assets for different social groups, with possible implications for whether assets enhancement will close the gap between groups. In UP half the difference in per capita consumption between SC/ST households and others could be explained by differences in assets, while the other half was due to differences in returns to those assets (Kozel and Parker 2003). A similar pattern was found in AP (Lanjouw and Zaidi 2002). Using 1993/94 and 1999/2000 rounds of NSS data, Sundaram and Tendulkar (2003) found that in rural areas all groups working as agricultural labor households recorded a decline in poverty, except for Scheduled Tribes, suggesting 'discrimination' within the economic sector.

A paper by Gang et al. (2002) *decomposed* differences between the poverty rates of SC, ST and non SC/ST households, and found half of the difference is caused by the difference in characteristics of groups (education, occupation, demographic, location), and the other half by the effect that these characteristics have on the probability of being poor. Kunal Sen (2003) uses 1993-94 NSS data for Orissa and India, and through regression analysis shows that in Orissa ST (though not SC) are more likely to be in poverty holding other factors constant. Using 1999/2000 data, we carried out a similar analysis as Kunal Sen's (de Haan and Dubey 2003). Apart from the importance of education in escaping poverty, this showed that relative to other groups, and holding other factors constant, a household is more like to be poor if it belongs to one of the deprived groups: in India a ST household is 30% more likely to be poor than others, and in Orissa 39%.

Non-income indicators of poverty allow for similar analysis, as some of the studies quoted here also show. In education, Drèze and Kingdon (2001) show that SC and ST children were less likely to go to school, even after controlling for the wealth of the household, quality of the school, and parents' education and motivation. An on health

indicators, referred to above, it has been shown on the basis of NFHS data that there are differences in neonatal and maternal mortality across social groups, but that the differences are small and not statistically significant when other socio-economic variables are controlled for.[31]

But, as some of the studies of course acknowledge, the discrimination that these studies highlight is *statistical* discrimination. Taken by itself, the explanation does not help to understand the *reasons* for discrimination – though it has helped to rule out a number of other explanations for the disparities – nor for that matter does it give an indication of the kinds of policies that could help address the discrimination. To further understand the reasons for disparities is particularly crucial, as they can be of radically opposing nature (i.e. both a racial explanation, or a common but unexplained association of high levels of poverty with high concentration of Adivasis, and one that emphasizes the discrimination of such groups).

What does such 'understanding' imply? A notion of social exclusion would emphasize the processes and institutions are behind this particular form of deprivation. To start with, these are rather different for the cases of Dalits and Adivasis (though in statistical analysis there emerge mostly – though not necessarily – as matters of degree). Discrimination against Dalits is embedded in discrimination within the Hindu caste system, with its association of pollution including in the sphere of labor markets, while that against Adivasis its related in principle to their position outside the Hindu structure. Deprivation of Dalits is situated geographically within mainstream society, while that of Adivasis is to a large extent related to physical remoteness – though that remoteness has also been associated with displacement due to modern industries, and outside control over natural resources. Analysis of these issues is not the monopoly of any approach, but does require going beyond mere descriptions of deprivation in terms of 'outcomes'.

Behind the data that showed fairly constant levels of disparities are important changes. Many studies of course have documented those (some summarized in Bahuguna and de Haan 2002), and do not need repeating for the argument here. The key point is that while discrimination in the socio-economic sphere has continued to exist (as documented above, at the aggregate level), in other spheres an enormous amount of churning within the social structure has taken place. In particular, political changes have been significant, with much stronger representation of deprived groups in most levels of the political structure, partly through reservation, and partly through social 'revolution'. Policies for reducing disparities, in various forms, have played an important role in this. Key to understanding the deprivation of and discrimination against particular groups would thus be around the relative lack of economic empowerment (or 'substantive justice') in the context of a broadening of the political democracy.

Further, a notion of understanding, including explanation in the sense of Max Weber's *Verstehen,* the "intimate and emphatic understanding of human action in terms of its

interpretative meaning to the subject". In this case, it is crucial to understand attitudes and believes, and corresponding action, of both deprived and non-deprived groups (including though administrative practices, as highlighted by Alan Rew et al in the case of Orissa). Discrimination is embedded within social structures and social relations, and expressed through both conscious and unconscious actions, which contribute to and sustain deprivation. Discrimination is mostly clearly expressed in practices of untouchability, but can be extended to a range of spheres including land ownership and labor markets. Long-standing and deep-rooted practices of discrimination also has impacted on expectations and behavior of discriminated groups, and conformity to and/or protests against the structure of discrimination needs to be incorporated in an understanding of their actions.

Similar issues pertain to the analysis of gender discrimination. First, as emphasized above and shown in quantitative analysis, gender discrimination is context specific, and differs across social and economic groups even within the state of Orissa (implying also that not all forms of deprivation necessarily are cumulative). This suggests the need for in-depth and localized study of deprivation, to understand why girl children are discriminated against (as sex ratio trends highlight). An example of such analysis is provided in documentation in preparation for the 2nd IFAD project, providing some nuances in considering gender issues and disparities in Orissa, particularly in tribal areas (including differences with scheduled castes). This stresses that different tribes and sub-groups have different values and social relations, and warns in particular against generalization regarding gender discrimination against women among tribal groups, assuming these are similar as in other groups (or the same among all tribes). Gender division of labor and responsibilities are more equitable in tribal areas than in other areas in Orissa, reflected for example in a tradition of bride price (and possibly also in the more equal sex ratios). Gender differences may be growing in these areas, however: movement of tribals to new areas leads to registration of ownership in the name of male heads of households and impacts traditional land use; assignment of individual use of land results in discrimination against women; women's traditional economic role and freedom may not always lead directly into participation in new forms of decision making (e.g. in context of reservation for women in panchayats); and a gender bias has evolved in the more traditional or mainstream education system. This analysis stresses how important it is to avoid generalizations, as they may lead to possible harmful advice regarding development interventions. For this paper, the key point is to go beyond the description of the visible outcomes of gender discrimination, and understand the necessarily context-specific reasons behind discrimination, how these are embedded in social values and practices.

The point here is of course not to suggest new theories regarding caste and gender discrimination, and large literatures exist on both subjects. Instead, the discussion in this section points at the limitations of poverty analysis, including of the analysis that highlights statistical discrimination, and the need to probe further in the sense of a need to understand, in the Weberian or anthropological sense, the values and norms that inform people's actions. But this discussion also suggests that participatory techniques, those of

the rapid kind, may not by themselves help to get to such understanding, as certain practices may not be revealed in short interactions between researchers and the people or groups concerned, and it remains important to retain a view as proposed for example by Anthony Giddens which defines agency and structure as equally constitutive elements of society including the understanding of deprivation.

7. Conclusion

What this paper proposes is not a methodology, and the methodological approach for the description of deprivation in this paper is very eclectic in its methodological approach. What the paper proposes, however, is a problem-oriented approach, that spells out the issues that need to be incorporated to understand, in a particular context, the nature of poverty. It is also driven by the belief that a description of measurable indicators of deprivation, by itself, is not sufficient, and that the in development studies dominant approaches to poverty analysis need to be broadened to look much more often, and as integral part of the poverty analysis, at the causes of poverty. This could be captured under the banner of complementarity of approaches, but for me this expresses insufficiently what are, say, minimum requirements of a good poverty analysis.

The concept of social exclusion may help to make this point. This is complicated because of the different associations with the concept (i.e. associating social exclusion with a quantitative notion of relative deprivation, while legitimate, ignores fundamental methodological differences). More important than the concept itself, is the tradition and disciplinary background that comes with it. The notion is a useful way of capturing a useful and important way of looking at deprivation, i.e. the active nature and processes responsible for deprivation. In that sense, such a notion is as relevant for analysis in contexts of widespread absolute poverty, as it is in the OECD context where the concept originated.

An emphasis on complementarity of methods therefore is (too) limited for the key point made here. A discussion of differing concepts of social exclusion – the Anglo-Saxon tradition with a specialization paradigm versus a continental tradition with a solidaristic paradigm – may help to illuminate why. There is a strong link between the dominant poverty analysis that was introduced during the 1980s (often by the World Bank), and the type of approaches to poverty reduction that were dominant during that period. The emphasis on identifying how many poor there are, where they are, their characteristics, etc. serves very well for what has been termed a ‘residual’ approach to poverty reduction, and an emphasis on safety nets. A residual or safety nets approach to poverty reduction focuses on measures for the people who fall outside the system, for example as the result of economic crises. This identifies the existence of poverty as a phenomenon external to the social-economic system, something that can be addressed by mitigating measures.[32]

The discussion of discrimination is meant to illustrate that deprivation exists very much within the socio-economic system, and that to address these certain 'rules of the game' need changing. Approaches to poverty analysis can be considered 'complementary' only if they are considered of equal value; not when descriptions of visible outcomes are considered more important than the analysis that is essential to understand the underlying reasons for those disparities.[33] These differences are deep-rooted in poverty analysis, perhaps more so, or at least less visible, than the qualitative-quantitative divide, and much of the difficulties in the debates on conceptualization of social exclusion seems situated in fundamentally different ways of conceptualizing society, and in the case of poverty analysis the strong emphasis on defining, measuring, and identification of the poor,[34] and as such strongly embedded in an individualistic approach.[35]

Participatory methods, I believe, have not filled this gap. Its focus on the perspectives of poor people has highlighted another side of the insight obtained from the quantitative, 'objective' analysis, with better insight of the perspectives of poor people on their poverty. As mentioned earlier, a priori it may be incorrect to assume that poor people's interests are necessarily better served with one kind of data or the other (much depends on the results of the analysis), or that they would necessarily identify underlying causes of deprivation. A key methodological point is about restoring the role of the analyst, by emphasizing her/his role in uncovering underlying social structures, through a method (or methods) that appears most appropriate for particular, context-specific issues.

Notes

[1] Payne *et al.* in the British journal sociology similarly states that the dominant position regarding methodologies of research has been of 'methodological pluralism'; however only one in 20 published papers in fact included quantitative analysis.

[2] Palys (2003: Chapter 1), though I believe this overstates the case associating quantitative approaches with natural science models, positivism, realism, observable cause-effect, objectivity, nomothetic and deductive analysis; versus qualitative approaches with human-centered, phenomenologism, *verstehen*, intimacy, constructionism, inductive approach, emphasis on process, and even and challenges of existing status quo. Most of these issues are in fact cross-cutting, and the emphasis in this article is on one axis of these, the emphasis on processes versus outcomes, and different ways in which 'understanding' can be understood.

[3] Andy Norton (pers comm.) once mentioned that alleged poor quality of surveys – stories of questionnaires filled out sitting in shades of trees and tea stalls – were one of the reasons of the ascent of participatory methods; by itself hardly a good reason.

[4] Brett (2003) on current participatory theory Eyben (2003) illustrates this with respect to debates on inequality. It can be easily tested by a look at the references used in many of the texts on the qual-quant debate, which tend to have very few references to literature outside the field of development studies.

[5] For further elaboration of this point, one could look at, first, where quantitative poverty analysis in the UK and elsewhere is situated, and second and more difficult to argue, what kind of economics skills are required for much of the poverty analysis, and whether 'econometric' analysis often is not more than 'statistical' analysis. It may not be a coincidence that, as Ravallion recently remarked, that the science of economics that puts individuals' rational behavior at the forefront of its theoretical frameworks, has generally neglected to ask people (which points at what may be a more fundamental difference between economists and other than the quant-qual one, i.e. the emphasis on deductive versus inductive reasoning). See also Jan Breman's comments in a recent EPW article, related to economists' dominance in the poverty debate, and his disappointment that earlier dialogues between economists and anthropologists (Bardhan) hadn't been continued.

[6] As Ravi Kanbur also suggests; the differences suggested here seem most relevant for the fifth dimension highlighted as conclusion of the 1st Qual-Qant workshop, in Kanbur (2003: 9).

[7] This showed for example that there were larger disparities in the trends in income poverty than in most of human development indicators, which in education at least can be attributed to targeted policies for education for all (both sets of data, incidentally, obtained through quantitative methods).

[8] But see also Demery et al. 1993 and the Poverty Analysis Manual by Aho et al. 1998 which devotes a chapter to economic and social policies, and one to employment policies.

[9] In a good positivist tradition, this claim may be falsified easily. The growth-poverty debate to me appears to illustrate the point, with an unchallenged assumption that a measurement of consumption poverty is the most appropriate way of looking at the impact of economic growth and various kinds of economic policies, i.e. without reflection on how a measure of economic growth (unless this is defined as consumption measures, but this begs the question) would translate into a measure of consumption and poverty. The debate, in India and elsewhere regarding divergence between trends in national accounts and household surveys, illustrates an aspect of the problem.

[10] I come back to this in the conclusion, and discussed this more extensively in a recent conference paper in Hamilton (de Haan 2004).

[11] It is worth further exploration whether the question of disaggregation is central to the debate; in any case I have personally felt this to be an important difference between at least some of the economists in development agencies and non-economist social scientists.

[12] John Harriss (2007) argues that mainstream poverty research have failed to address the political economy of deprivation, and is part of the anti-politics machine as described by Ferguson. See also Booth et al (2007) and Green (2007) in this series of Q-squared Working Papers for related social science perspectives.

[13] The differences between French and Anglo-Saxon interpretations of poverty and social exclusion are illuminating; in the UK after 1997 the Social Exclusion Unit was perceived as an innovative institution to mainstream concerns around deprivation across sectors and departments. See Evans et al and Silver and Wilkinson for discussions of differences between French and English approaches.

[14] Though the emphasis here is on different ways in which social exclusion is defines, it may be added that societies have different interpretations of equality or fairness: a study showed that in Scandinavia popular

assessment regarded a top-and-bottom income ratio of 4-to-1 as just, compared to 12-to-1 in the US (in: Esping-Andersen 1999: 7).

[15] They are schematic representation of (national) traditions, and in practice analysts and policy makers will be influenced by aspects of different traditions. They are *concepts*, ways of looking at reality rather than reality itself.

[16] See de Haan (1999); the reference to Durkheim illustrates the complexity of theoretical distinctions, as in then debate here the concept of solidarity is invoked to emphasize social processes of differentiation, while in the quantitative-qualitative distinction highlighted by Palys (see fn.1) Durkheim's contribution to sociology is – rightly – associated with the origins of positivism.

[17] Varied critique of the concepts including those from a gender perspective (Jackson 1998) and structuralist perspectives that stress 'adverse incorporation' (Geof Wood). In earlier articles I have emphasized the different interpretations given to the concept in the country studies of the original IILS work.

[18] Research by Paugam (1995) in France showed that people who lose their jobs are not only deprived of income, but are also more likely to have marital problems, less contact with family and friends, and feel socially disqualified.

[19] See for example Jordan (1996), and also much of the subsequent work by the ESCR funded Centre for Analysis of Social Exclusion, e.g. Piachaud (2002).

[20] Comments during on of the preparatory workshops for WDR2000/2001; his article in the volume (Bourguignon 2000) resulting from this workshop emphasizes the link between social exclusion and permanent poverty, associating social exclusion with an attribute of poverty (called 'social' as opposed to 'physical'). The contribution by Kaushik Basu in the same workshop/volume is of relevance, with a focus on social norms and exclusionary arrangements, and a focus on individual motivations to exclude others, and the need for 'evolutionary analysis' that is required for understanding forms of exclusion that cannot be explained within such an individualistic framework.

[21] This is illustrated in section 5, in the discussion on discrimination. See also Sen (1998: 47), and a similar distinction can be made with respect to notions of inequality (or 'inequality trap', as in Rao 2006).

[22] It is possible to further disaggregate the NSS data, to the level of the 13 districts as they existed in 1991 (these were subsequently divided into 30 districts), though for some of the districts the sample may be rather low for reliable estimates. This shows further remarkable differences, emphasizing also the heterogeneous character within the regions as described above (e.g. Bolangir). But it shows the extremes even further apart: the estimated poverty headcount in Puri is 22%, while in Koraput it is almost 4 times as high (80%).

[23] NSS data, its unit records, have become available widely only recently, which opens up a whole new and possibly politically sensitive area of enquiry in deprivation of minorities. Incidentally, and possibly unaware of the potentials of NSS data, a separate and unofficial survey on deprivations of Muslims was conducted (c.f. Zoya Hussain).

[24] See Rew (2007). In a paper for a book by Moncrieffe and Eyben, I discuss the importance of labels as commonly used in poverty analysis and policy measures (de Haan, forthcoming).

[25] Panda also shows that the 1999 super-cyclone did *not* have a big impact on the poverty headcount (possibly, because influx of assistance keeps consumption levels relatively high and recorded poverty therefore low).

[26] The NFHS sample has about 4-5000 households, and may allow for disaggregation to the level of the old 13 districts, similar to NSS data.

[27] Part of the regional disparities are of course linked to differences in rates of economic growth, but as Ravallion in particular has emphasized growth-poverty elasticities vary a great deal, and this is interlinked with human development indicators.

[28] According to Amaresh Dubey, access to PDS may lead to distortion in poverty estimates, as goods are purchased below the market price, and hence consumption underestimated (de Haan and Dubey 2003).

[29] The debate on this study, commissioned by DFID for the Government of Orissa's Poverty Task Force, in official circles has illustrated – in this context – the importance of 'accepted' methodologies: a more conservative methodological approach (including relating to representativeness) may have had a bigger impact and influence on the government.

[30] Believes that such disparities have existed for centuries can easily be ascertained through other methods, even by listening to Laloo Yadav's reasons for his corrupt practices!

[31] Natarajan (2003); however, the absence of large disparities may be because there is no discrimination (which would be surprising given anecdotal evidence), but also because of a general lack of health services for the poor.

[32] In the context of analysis of the Egyptian social fund, Jeremy Holland (1999) emphasizes that the "nature of poverty analysis is inextricably linked with the nature of policy demands… Within a residualist paradigm, in which policy intervention is aimed at mitigation, there is no in-built incentive to seek to understand the underlying causal dynamics of poverty; by definition the state of poverty is considered an unfortunate but transitional part of a longer-term process of improving socioeconomic well-being."

[33] This is a fundamental point of critique by Gore (1994) on Sen's capability approach, that this would neglect the 'unruly practices' of social life and economic systems; Sen responded that such practices are highlighted in his work on famines, but I believe that the theoretical work on capabilities remains within the confines of an individualistic framework.

[34] Hence also, I believe, the work on different concepts of poverty at Oxford, missed the significance of the more fundamental differences behind a concept of social exclusion, illustrated in their conclusion from the theoretical review: "there is no unique, or 'objective', way of *defining* and *measuring* poverty. For each approach the *identification* of the poor depends partly on assumptions …" (Franco et al., emphasis added).

[35] An interesting emphasis on individualism revolves around the emphasis on the rational behavior of poor people and resistance to "attributing poverty to 'incorrect' household deployment of resources adequate to meet needs" (Lipton, 1983, quoted in Shaffer 2002: 62).

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