
THE INDIVIDUAL DEPRIVATION MEASURE

A Gender-Sensitive Approach
to Poverty Measurement

Authors

Scott Wisor, Sharon Bessell, Fatima Castillo,
Joanne Crawford, Kieran Donaghue, Janet Hunt,
Alison Jaggar, Amy Liu, and Thomas Pogge



**Individual
Deprivation
Measure**

Contributing Researchers Include:

Angola: Veronica Sappolo, Cristiano Matsinhe,
Members of Plataforma Mulheres em Acção
(Woman in Action Platform)

Fiji: Priya Chattier, Emele Morgan

Indonesia: Ulfah Muhayani, Noor Jehhan, Yuliati
Hotifah, Ilfi Nur Diana

Malawi: Maggie Kathewera Banda, Peter M.
Mvula, Martin Mazinga, Gift Mauluka

Mozambique: Cristiano Matsinhe, Edite Cumbe,
Helder Nhahamze, Katia Nagale, Dulce Passades

Philippines: Fatima Castillo, Nimfa Bracamonte,
Erlinda Palaganas, Cora Anonuevo

This report was first published in November 2014. Subsequent work in Fiji which aimed to replicate the Philippines' analysis revealed some issues with the syntax used in the Philippines. Various technical issues and analysis challenges were documented in the Fiji IDM study report, *Exploring Multidimensional Poverty in Fiji: Findings from a Study Using the Individual Deprivation Measure*. Reanalysis of the IDM Philippines data in light of the Fiji learning has informed revisions to the initial IDM survey tool, approach to weighting and composite index construction, as part of the 2016-2020 program to ready the IDM for global use. This is documented in the *2017 IDM Research Update*.

Acknowledgements

We are grateful to lead researchers, including Alice Banze, Cristiano Matsinhe, Edite Cumbe, Kátia Ngale, Hélder Nhamaze, Dulce Passades, Maggie Kathewera Banda, Peter M. Mvula, Gift Mauluka, Martin Mazinga, Veronica Sappolo, Fatima Castillo, Erlinda Palaganas, Nimfa Bracamonte, Cora Anonuevo, Priya Chattier, Emele Morgan, Ulfah Muhayani, Ilfi Nur Diana, Yuliati Hotifah, Noor Jehhan, Sharon Bhagwan Rolls, and the many field researchers who worked with them. Ronnie Holmes and Pulse Asia successfully administered the third phase survey. Support from the Centre for the Study of Mind in Nature, University of Oslo, including Lina Tosterud, ensured a conducive space for project planning and end-of-project reflections. We've benefitted from many useful conversations and critical comments along the way, including from Marc Fleurbaey, Michael Bittman, Christian Barry, Sylvia Chant, Stephan Klassen, Sabina Alkire, Des Gaspar, Dan Banik, Andreas Follesdal, Henrik Wiig, Ines Smyth, Caroline Sweetman, Mandy Yap, Rosa Terlazzo, Lina Eriksson, Koen Decanq, Juan Munoz, Elisabetta Aurino, Nicole Rippin, and Haldis Haukannes, as well as from attentive audiences at the Australian Agency for International Development, the Australian Bureau of Statistics, the Australian National University, the University of Technology Sydney, the Brooks World Poverty Institute, Charles Sturt University, the City University of New York, the Comparative Research Programme on Poverty, the Human Development and Capabilities Association, the Facultad Latinoamericana de Ciencias Sociales, the Organisation for Economic Co-operation and Development, Oxfam Great Britain, the Oxford Poverty and Human Development Initiative, the Oxford Society for Applied Philosophy, George Washington and Princeton Universities, UN Women New York, and the Universities of Bergen, Oslo, and Wellington. IWDA staff and volunteers provided invaluable support of all kinds, including with editing, graphic design and web presentation; particular thanks to Lauren Darley Bentley, Kelly Smith-Holbourn, Sabrina Cleevely, Shelley Bourke, Suzanne Fletcher, Mary Sinnott, Jane Bell, Tamara Hunt, Caitlin White, Sarah Smith, Mary Tomlinson, Farida Felstead, Christie Basset. There will be others who made a difference in some way over the life of this project, and we thank you for that contribution. Above all, we are grateful to the participants who gave their time and expertise to this research project, in sometimes difficult and challenging conversations. There are not many immediate benefits to participating in a research project of this kind—we hope their insights go some way towards improving the measurement, and subsequent eradication, of deprivation.

Financial and in-kind support for this project was generously provided by: The Australian Research Council Linkage Grant (LP0989385), The Australian National University, The International Women's Development Agency, Oxfam Great Britain Southern Africa, Philippines Health Social Science Association, Oxfam America, the University of Colorado at Boulder, and the Centre for the Study of Mind in Nature at the University of Oslo.



PREFACE

ALISON M. JAGGAR AND THOMAS W. POGGE

This project began in a conversation between the two of us about poverty and gender. Alison was very enthusiastic about Thomas's work on global poverty but asked why he had so not far addressed the so-called feminisation of poverty. Thomas asked for evidence supporting the familiar claim that "poverty wears a woman's face" and, when we looked into the matter more deeply, we found that the available evidence was quite unconvincing. Not only were the statistics sketchy and the term "feminisation of poverty" used equivocally; worse, the existing poverty metrics were arguably biased by culture and gender and also lacked explicit and plausible justifications. In order to investigate the gendered dimensions of global poverty, we needed a non-arbitrary metric supported by sound and open reasoning.

The Individual Deprivation Measure aims to offer such a metric. Designing it posed several formidable challenges. Most obviously, in order to measure poverty on a global scale, we needed a standard embodying a conception of poverty that is sufficiently uniform to permit transnational comparisons and yet also sufficiently flexible to incorporate diverse context-specific interpretations of what it means to be poor. Although many people in the developed world take poverty to be synonymous with lack of money, many people elsewhere understand poverty differently, assessing wealth in terms of land or cows or social relationships. We wanted to design a metric that would connect with official poverty statistics, yet would also be consistent with the understandings of poverty held by many poor people across the world. One way of putting this is that we wanted to avoid what has been called WEIRD bias. WEIRD people are: Western, Educated, Industrialised, Rich and Democratic. Cognitive scientists have found that the thinking of people who are demographically WEIRD is also, in a global context, often weird in the sense of being unusual or anomalous.

We were also very much concerned to develop a metric capable of revealing whether or in what ways global poverty might be gendered. For us, this meant more than disaggregating poverty data by sex; more fundamentally, it meant rethinking what the more relevant poverty data are. We asked whether existing metrics might involve gender bias as well as possible cultural bias, reflecting ideas about poverty that were better suited to assessing men's lives rather than women's.

Biased poverty standards are problematic for several reasons. Most obviously, they cannot enable us to assess accurately how various individuals and groups are faring relative to one another. We cannot rely on them in evaluating the consequences of policy interventions designed to alleviate poverty or in figuring out who the relative winners and losers are from the choice of some particular trade regime or other institutional arrangement. Biased metrics impede both effective policy development and fair appraisals of justice. Moreover, political and economic interventions undertaken in the name of poverty alleviation are authoritarian when they presuppose conceptions of wealth and poverty that are not shared by the people whose lives may be radically changed by those interventions.

Poverty, like wealth, is a value laden concept. It is tied inextricably to people's conceptions of the good life. Because poverty is something that people determine rather than discover, the goal of our project could not be to develop a poverty metric that would be value-free. Instead, it was to design a metric that would be as inclusive as possible of values held by many poor people, women as well as men, and to justify our conclusions by sound moral argument.

The collaborative partnership pursuing this project was formed under the auspices of the Australian Research Council's Linkage Grant program. It was led by Thomas Pogge, then of the Centre for Applied Philosophy and Public Ethics (CAPPE) at the Australian National University, and it included, as "industry" partners, the International Women's Development Agency (IWDA), Oxfam Great Britain (Southern Africa Region), the Philippine Health and Social Science Association, Oxfam America, the University of Colorado at Boulder, and the Center for the Study of Mind in Nature at the University of Oslo. In diverse ways, the project partners played crucial roles in the conception or execution of the field work. We also were extremely fortunate in regard to the research partners we recruited in our six field work countries, and the many fieldworkers they inspired and directed.

Seeking more inclusive understandings of poverty, our research team asked poor people in six countries what poverty meant to them. Within the resource constraints of our budget, we made conscious efforts to talk with people in diverse circumstances. Selecting communities categorised as urban, rural and highly marginalised, we

worked with people situated differently on a range of social dimensions such as ethnicity, religion and age. In investigating how people's social identities influence the ways in which they experienced poverty and shape their understandings of who is impoverished, who is not, how and why, we chose to give special attention to investigating the difference gender might make.

Gender was central in our investigation. We wanted to know whether and to what extent women and men might suffer poverty differently and whether they might systematically disagree about the priorities for creating a life free from poverty and hardship. We therefore interviewed not ungendered "poor people" but rather poor women and poor men, asking explicit questions about how the distribution of deprivation is, in their view, gendered. We employed female researchers to interview women and usually interviewed people in gender-separated groups, hoping that this would encourage women participants to speak more freely. We also incorporated explicit questions about possible aspects of poverty that other researchers had found to reveal gender disparities or to be especially important to women. For example, free time, sexual autonomy, family planning, freedom from violence and mobility are all areas found to be quite important to poor women but still remain under-represented in official data collection exercises. Finally, because it has often been asserted that women and girls are worse off than men and boys even within the same household, we took individuals rather than households as our unit of assessment.

Our project was thoroughly multi-disciplinary. For instance, although we used ethnographic methods, our research was not exclusively anthropological. Our goal was not simply to investigate what poor people in various cultures believe poverty to be, but instead to draw on poor people's ideas to inform the metrics used by academics and experts. Our research was also as democratic as possible within real-world constraints. For instance, our team did not treat lay participants simply as sources of experiential data, to be weighed and analysed by others. Instead, our methodology was designed deliberately to enable lay participants to reflect critically both on their own initial reports of their experience and on the reports provided by others.

The Individual Deprivation Measure (IDM) is certainly not the last word in poverty measurement; clearly, as with any initiative of this kind, use in a variety of contexts will lead to insights and ideas for refinement that will progressively improve the measure's performance. We offer our measure as a proposal that we intend to take forward, and invite others to do likewise. We think the distinctive value of our work lies in our conceptual, moral, and political approach to measuring poverty. Conceptually, we began by recognising that poverty is a moral as well as economic and sociological concept. All poverty metrics incorporate values, whether or not these are overtly recognised. Reliable poverty metrics therefore require explicit moral justification. Morally and politically, we began with the conviction that people's lives should not be subject to disruptive interventions when these interventions are rationalised by conceptions of poverty that disregard their values and were developed without their input. Although the IDM results from a research project that was relatively small in scale, it incorporates the ideas of many people, including many poor people. Our research aspired to inclusive and transparent justification and, although the realisation of these ideals was imperfect, we hope that our philosophical approach provides a model for further work on poverty measurement.

In developing the IDM, we aimed for a measure of poverty and gendered inequality that would be more inclusive, accurate, fair, and better justified than previous metrics by being participatory and gender-sensitive in its construction as well as individualised and multi-dimensional in its design. Learning how to develop better ways of measuring severe disadvantage is an essential step toward reducing and perhaps eventually ending gendered poverty and inequality.

EXECUTIVE SUMMARY

EXISTING APPROACHES TO MEASURING POVERTY AND GENDER DISPARITY SUFFER FROM A VARIETY OF FLAWS. THEY OFTEN EXCLUDE IMPORTANT DIMENSIONS OF DEPRIVATION, ARE DIFFICULT TO COMPARE ACROSS CONTEXTS AND OVER TIME, TAKE THE HOUSEHOLD RATHER THAN THE INDIVIDUAL AS THE UNIT OF ANALYSIS, AND ARE INCAPABLE OF REVEALING GENDER DISPARITIES. FURTHERMORE, MOST EXISTING MEASURES ARE NOT JUSTIFIED THROUGH PROCESSES OF PUBLIC REASON THAT INCLUDE POOR MEN AND WOMEN.

To develop a new, gender-sensitive measure of multidimensional poverty, we undertook participatory research in Angola, Fiji, Indonesia, Malawi, Mozambique, and the Philippines. Local research teams worked with men and women in poor communities to understand how they viewed poverty and related hardships, to what extent they saw these as gendered, and how they thought deprivation could best be measured.

After two phases of participatory research, we developed the Individual Deprivation Measure (IDM). The IDM improves upon existing measures of poverty and gender equity in several ways. It measures deprivation at the individual rather than household level, allowing for the investigation of the distribution of deprivation within the household and the construction of gender equity indices based on individual achievement. It is justified through a process of public reason, and takes account of previously excluded dimensions of deprivation, especially

those important for revealing gender disparity. It uses interval rather than binary scoring, to allow for evaluating the different degrees of deprivation below a minimally acceptable threshold. Furthermore, the survey used to calculate the IDM is extremely easy to administer and financially less costly than its competitors. And the IDM makes poverty assessments that are comparable across contexts and over time.

The IDM measures deprivation in 15 dimensions of human life: food, water, shelter, sanitation, health care, education, energy/cooking fuel, sanitation, family relationships, clothing/personal care, violence, family planning, the environment, voice in the community, time-use, and respect and freedom from risk at work.

In each dimension, individuals are scored on an interval scale of one to five, with one representing the lowest possible achievement in a dimension, and five representing no deprivation, or a minimally acceptable level of achievement. The IDM employs a weighting scheme which gives greater weight to more severe deprivations, and greater weight to dimensions of more importance, as determined by participant evaluation.

The IDM is ready for use by governments, international development agencies, NGOs, and local communities interested in improving the measurement of poverty and gender disparity. Data is captured through a low cost, easy to administer survey that quickly generates gender-sensitive, multidimensional poverty assessments. While this report discusses possible future refinements to the IDM, e.g. fine-tuning dimensions and indicators, generating participatory weighting schemes, improving context sensitivity, and expanding to evaluate childhood deprivation, the improvements over previous forms of multidimensional poverty measurement are considerable, and deserve quick uptake in development practice.

TABLE OF CONTENTS

CHAPTER ONE	01
PROJECT INTRODUCTION	
CHAPTER TWO	11
PHASE ONE: METHODS AND FINDINGS	
CHAPTER THREE	21
PHASE TWO: METHODS AND FINDINGS	
CHAPTER FOUR	27
THE INDIVIDUAL DEPRIVATION MEASURE: A NEW TOOL FOR MEASURING POVERTY AND GENDER	
CHAPTER FIVE	41
SURVEY AND SCORING THE INDIVIDUAL DEPRIVATION MEASURE	
CHAPTER SIX	53
PILOTING THE INDIVIDUAL DEPRIVATION MEASURE: MEASURING DEPRIVATION IN THE PHILIPPINES	
CHAPTER SEVEN	61
DIRECTIONS FOR FUTURE RESEARCH	
REFERENCES	67