



# Epistemology, Normative Theory and Poverty Analysis: Implications for Q-Squared in Practice

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**Summary.** — The turn to the use of mixed qualitative and quantitative (Q-Squared) methods in the analysis of poverty is a welcome development with large potential payoffs. While the benefits of mixing are not in doubt, the tensions involved in so doing have not received adequate attention. The aim of this paper is to address this gap in the “Q-Squared” literature. It argues that there are important differences between approaches to poverty which operate at the levels of epistemology and normative theory. These differences have implications for the numerical transformation of data, the selection of validity criteria, the conception/dimension of poverty adopted and interpersonal comparisons of well-being.  
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## 1. INTRODUCTION

In recent years, increasing attention has been focused on using mixed qualitative and quantitative (Q-Squared) methods in the analysis of poverty. A number of conferences<sup>1</sup> have been devoted to this issue and a growing body of work has accumulated.<sup>2</sup> The articles in this Symposium are examples. They were among a dozen or so empirical examples of *Best Practice* in combining approaches to poverty analysis selected for a conference held at the University of Toronto in May 2004 entitled “Q-Squared in Practice: Combining Qualitative and Quantitative Approaches to Poverty Analysis.” The conference is the second in a series of the “Q-Squared initiative,” which aims to promote a better integration of “qualitative” and “quantitative” approaches to the analysis of poverty.

This recent rediscovery of mixed methods in poverty analysis is a welcome development with large potential payoffs in terms of understanding and explaining poverty. There are many examples of value-added associated with mix-

ing found in the contributions to this Symposium, such as the use of “qualitative” information to improve household survey design (Parker and Kozel, Jha *et al.*); interpret counterintuitive or surprising findings from household surveys (Parker and Kozel, Sharp); explain the reasons behind observed outcomes (London *et al.*, Adato *et al.*); probe motivations

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underlying observed behavior (Place *et al.*, Rew *et al.*); suggest the direction of causality (Place *et al.*); assess the validity of quantitative results (Barahona and Levy); better understand conceptual categories such as labor and the household (Adato *et al.*); facilitate analysis of locally meaningful categories of social differentiation (Howe and McKay, Hargreaves *et al.*, Rew *et al.*); provide a dynamic dimension to one-off household survey data (Howe and McKay), etc.

In our view, the benefits of mixing are not in doubt. It does seem, however, that the tensions involved in so doing have not received adequate attention. There is a tendency to underplay differences between approaches and consequent difficulties in fruitfully combining them.<sup>3</sup> As Appadurai (1989) argued in the context of a similar debate 15 years ago, a certain “ecumenism” has characterized the Q-Squared debate with differences between approaches viewed in technical terms, amenable to technical solutions.

The aim of this paper is to address this gap in the “Q-Squared” literature. It argues that there are important differences between approaches to poverty which operate at the levels of epistemology and normative theory.<sup>4</sup> These differences have implications for the numerical transformation of data, the selection of validity criteria, the conception/dimension of poverty adopted and interpersonal comparisons of well-being. The Q-Squared initiative ends up embroiled in these issues because the quest of broadening the methodological framework tends to bring out contrasting perspectives which go well beyond differences of method.

The format of the paper is as follows: Section 2 presents a critical assessment of an initial attempt to unpack the qualitative/quantitative distinction into five dimensions of difference. Section 3 directs attention to epistemological differences between approaches to poverty with implications for numerical transformation of data and validity criteria. Section 4 addresses contrasting traditions of normative theory with implications for the conception of poverty adopted. Throughout, the contributions in this Symposium, as well as other materials, are used to illustrate the above issues.<sup>5</sup>

## 2. A TYPOLOGY

At the first Q-Squared Conference at Cornell University in 2001, entitled *Qualitative and*

*Quantitative Poverty Appraisal: Complementarities, Tensions and the Way Forward*, considerable attention was devoted to definitional and conceptual issues relating the qualitative/quantitative distinction. Conference participants had different views on how the “qual/quant” divide should be conceptualized though all agreed that a finer set of categories was required to capture its many dimensions. One such typology of differences was proposed by Kanbur (2003) building upon, and adding to, a number of the schemas presented. It is based on the following five dimensions:

1. *Type of information on population*: non-numerical to numerical.
2. *Type of population coverage*: specific to general.
3. *Type of population involvement*: active to passive.
4. *Type of inference methodology*: inductive to deductive.
5. *Type of disciplinary framework*: broad social sciences to neo-classical economics.

This typology helps by clarifying terminology and spelling out exactly what is being distinguished. As such, it has served the purpose for which it was developed. Nevertheless, the schema does raise a number of issues concerning both the distinctions themselves and their derivation from foundational categories. A review of the five distinctions illustrates the point.

First, the numerical/nonnumerical distinction has cutting power. While it is possible to numerically transform almost any type of information by counting, scaling, ranking, etc., there are important differences in the numerical transformation process between types of data (see Section 3). Further, as discussed below, the distinction between data types is likely related to epistemological differences between traditions of inquiry in the social sciences.

The second distinction, between specific and general population coverage, is arguably more *incidental* than *essential* to the qual/quant divide. Just about any research technique, qualitative or quantitative, may be conducted in few or many sites. Fixed-response questionnaires may be applied in a single site and detailed ethnographies may be conducted over a range of sites to attempt to draw conclusions over a broader population.<sup>6</sup> Further, the content of household surveys and focus group or interview guides can be modified to be more or less context specific. This issue of scale

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