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## 15 Living with imperfect comparisons<sup>1</sup>

*Else Øyen*

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Together with the scope and extent of research, the number of comparative studies has increased greatly in recent years. As more and more countries are brought into such studies a growing array of social phenomena, variables and processes are being compared. Globalization, educational exchange programmes, access to megasize databanks, speedy electronic communication and increasing intellectual curiosity about ethnic and cultural differences can all be seen as part of this picture. The unfortunate thing is that comparative methodology has not developed at the same speed as new information and information technology.<sup>2</sup> While there are now masses of empirical material available and more power to incorporate large amounts of variables in a comparative analysis, basic methodological questions remain unsolved. For example, how do we know that one variable in one country carries the same cultural understanding in another country and therefore can be compared directly? How are we to understand the differential impact of the social context on a variable that is seemingly similar in different countries? How is it possible to control for the cultural impact of researchers on the formulation of research questions and interpretations of results? How can countries be compared where the lacunae in data give priority to better understanding of those countries that are rich in data? This is of particular importance since many countries in the South suffer from lack of data and are likely to do so for a long time to come. Is it at all possible to draw comparisons between highly industrialized countries and countries with a low level of industrialization? Does it make sense to compare countries with different dominant religious or political orientations? When can a nation be considered a more appropriate unit of analysis than a region or a community or a certain social group? The questions are many, and at present there are no standard answers that can be formulated into a fully satisfying comparative methodology. For example, using a demographic indicator such as birthrate in a certain population seems straightforward enough, provided one has the relevant and correct data. However, explaining why birthrates vary is a different matter that brings forward the kind of questions raised above. Using a more complex variable such as a definition of poverty brings out all the problems connected with non-equivalence. Even the simplest definition of poverty raises the issue of non-equivalence. If poverty is defined as a lack of access to potable water, the number of wells and other sources of water provision can be mapped, the

quality of the water can be judged, actual consumption of water per person can be investigated, as can the price. The processes whereby poor people have less access to water than the non-poor, need more time to fetch it, may have to pay more for it and have less command over how water is distributed, are at the core of poverty production. Some of these processes are culture-specific. Others are of such a general nature that they can be recognized worldwide. The former needs extensive investigations if several countries are part of the study and numerous variables need to be identified if direct comparisons are to take place. The latter needs thorough empirical material from the former, helped by theoretical shortcuts.

Comparative researchers have approached these various problems in different ways. Some will acknowledge the fact that within a national setting there may be an endless number of variables interfering with the phenomenon they have selected to study. As a consequence they focus on getting as many of these variables under control as possible. Sophisticated computer technology is brought in to analyse and compare available statistical data as well as new data collected for the study in case. However, the methodological gremlin is not deceived. For every single variable collected, the same unpleasant question can be raised: how do we know that one variable in one country expresses the same qualities and is perceived the same way as a variable with the same kind of characteristics found in another country? Ironically, the problem is magnified as more variables are brought in, variables that were supposed to solve another one of those questions in comparative studies.

Other researchers turn to in-depth studies of the phenomenon to be compared in order to understand better whether the phenomenon can be said to be the same in different countries, or how the variations are to be understood. The social context in which the phenomenon operates will likewise be scrutinized, variable by variable, interacting process by interacting process. The danger is that the myriad of information brought forward clutters up the picture, is difficult to organize and blurs the intended comparisons.

Most comparative researchers find their position somewhere in between these two extremes of simplification and complexity. Some are acutely aware of the many hurdles built into comparative studies. They try to overcome such obstacles wherever possible and in the final analysis discuss their assumed impact on the results of the study. Other researchers just go ahead with their comparative projects, follow the rules of a traditional scientific approach and treat comparative studies as any other social science project.

In the following I shall use comparative research on poverty as a frame of reference for the discussion. The context of research on poverty highlights the difficulties, but also the advantages of adopting a comparative focus.<sup>3</sup>

## **Obstacles to comparative research**

### *Traditional methodological problems*

Social science is based on comparisons, whether it is comparisons between different groups, different social phenomena, or different processes. Fundamentally, there ought to be little difference in the methodology used for doing comparative studies within a country and that of doing comparisons between countries. All the methodological baggage of problems found in comparisons in one context carries the same weight in another context. However, there are some additional problems that need to be taken into consideration.

The choice of unit of analysis, for example, needs to be questioned. Can a country be considered a more appropriate unit of analysis than a region or a community or a certain social group? One definition of a country is an administrative unit with well-defined geographical borders. Some such countries are bound together through a joint history, a set of national norms, a common infrastructure, a loyalty towards the ruling power, an integrated economy, a shared religious belief, and so forth. But even so, a country is likely to be a very heterogeneous structure, even under the 'best' of circumstances. How can such a complex conglomerate of different social structures, norms and behaviour be compared with another country that has a completely different composition? Even when certain elements in two or more countries are selected for comparisons, the eternal question remains: how to account for the impact of such heterogeneity on the results of a comparative study?

Another matter that needs to be taken into account is the cultural impact on the formulation of research questions and interpretation of results. For example, can poverty manifestations in one country be compared to poverty manifestations in another country, and if they look alike, also be considered to be alike and have the same meaning for the poor? If, as is often the case, the manifestations do not look alike, how can the differences be accounted for in such a way that comparisons are still possible? The many attempts to develop universal measures of poverty across time and space are faced with such obstacles. Elaborate scales of equivalence have been constructed to smooth out the effects of cultural differences in consumption patterns and other kinds of behaviour. To minimize cultural differences hard-core definitions of poverty have been introduced which include only the very basic necessities a person needs to survive. The World Bank definition of 'a dollar a day' as a universal definition of extreme poverty is an example of a hard-core definition – which in spite of its simplicity (and adjusted purchasing power parity) still falls under the spell of differential economic and social behaviour in a country. Databanks developed in the West rely on a set of social and economic indicators that can be standardized to make them useful for international comparisons of poverty (and other social phenomena). The

paradox of the increasingly omnipotent databanks is the trade-off between simple indicators which can easily be collected and standardized, and the arduous and costly collection of complex indicators which better reflect differential realities but are difficult to weigh and assemble in a comprehensive and reliable picture. Both kinds of indicators are culture-sensitive in ways we have not yet learned to overcome. Also, it should be added, they are culture-laden in the sense that the concept and methodology are developed within a Western mode of thinking that at times are alien to non-western cultures.<sup>4</sup>

#### *Epistemological problems*

The many lacunae in the systematic understanding of reason and rationality in the social and phenomenological space that poverty occupies is problematic to overcome in comparative studies where differences in culture and perceptions play an important role in the analysis.

The history of how an understanding of poverty has developed over time has not yet been written. Historians have been challenged by the broader issues of humanism and compared them under different regimes and ideological impacts. But to the extent that poverty has been drawn into the analysis, it has been perceived more as a nuisance than as a phenomenon to be analysed along the same lines as other social phenomena. Poverty reduction as a social phenomenon has received even less historical attention. While it can be assumed that the British Poor Law must have had a sizeable impact on the understanding and definition of poverty in the British colonies, little systematic knowledge is available on this process of influence.<sup>5</sup> In modern times the introduction of poverty lines in for example Australia and the United States must likewise have had an impact on the understanding and acceptance/rejection of the poor by the population at large. Again, this is an area that is under-researched, while the actual methodology of creating poverty lines can well be characterized as over-researched. The latter has developed into an international and comparative field of research with a worldwide impact on how to measure and define poverty. Lately the professional understanding of poverty and the poor has come to the forefront, through as diverse approaches as ethical discussions on the convergence of values between social workers and clients, participatory research as an expression of grassroots democracy, and the limitations of bureaucrats when they try to reach out to the poor (Chambers, 1996).<sup>6</sup>

Theoretical knowledge about poverty processes is limited altogether. Although 'everybody' has his or her own theory about the cause(s) of poverty, the scientific foundation for poverty understanding is still weak. The fact that popular perceptions of who the poor are, how they behave and why they are poor, may be one of the major obstacles as to why a scientific approach to

poverty has been slow to develop. It has not been considered necessary to invest in research and systematic production of knowledge on a topic where the answers seemed to be already in place.

As a result, the definitional tools needed for poverty research have not been well developed. A recent survey has brought out more than 200 poverty-related definitions or understandings of poverty.<sup>7</sup> A review of poverty studies shows that the definitions used in the various studies vary. This could be expected where the aims of the studies vary. However, many standard definitions are adopted uncritically and do not fit the declared aim of the study in question. Not uncommonly, variations in the use of a definition are found also within a particular study. It is as if the notion of poverty is considered an accepted norm that needs not to be spelled out in detail. For those engaging in comparative poverty research, many of those studies make comparisons fruitless.

The difficulties of methodological problems mentioned in the previous section hamper the use of definitions as analytical instruments as well. Together with an inconsistent application of definitions in empirical studies and theory formation, the comparative value in building up a theoretical coherent body has been undermined. Such lack of a theoretical framework leads to a situation where neither the 'right' questions, nor the 'wrong' questions become relevant to pose. Social scientists brought up in a tradition of dominant paradigms wander into a fuzzy field of theoretical fragmentation and everyday beliefs that blur their visions.

Another barrier to a more basic understanding of the poverty phenomena is the preoccupation with an administrative understanding of poverty that dominates current research. Poverty-reducing strategies become the property of those administrators and policy makers who are responsible for doing poverty reduction. Like the rest of us they need tools for their trade, and the development and implementation of poverty-reducing tools become their particular focus of attention. A large body of research has sprung up around the technicalities of poverty lines, the effects of one strategy as compared to another, the notion of best practices,<sup>8</sup> the use of discretion versus entitlements, measurements of need and the number of poor people, the impact of different strategies on unemployment and employment, and of course, the economy and budgetary drains of using different strategies. Very little of this research touches for example on the cognitive maps or the rationality of the actors involved in poverty reduction.

Apart from political philosophy's early studies there has been little research interest in state construction and its impact on poverty. It is only recently that political scientists have taken an interest in the welfare state construction.<sup>9</sup> The writings of Marshall (1964) and Titmuss (1968) on citizenship set a framework for a discussion on individual rights that was important for the understanding of the nature of poverty.<sup>10</sup> It will be interesting to

compare those discussions to current discussions on documents such as the *International Covenant on Economic, Social and Cultural Rights* which is an attempt to establish citizenship rights for poor people world-wide, as part of the Declaration of Human Rights. The early writings of social scientists like Lewis (1966), Moynihan (1968), Piven and Cloward (1971), Rawls (1971) and Gans (1973) set the poverty phenomenon in a larger social context which brought forward questions about the nature of poverty and the invisible functions it fulfils, also in societies which argue otherwise.<sup>11</sup>

Contextual poverty, that is the relationship between the poor and the non-poor and their institutions, is another ignored feature of poverty. Within this mode of thought the non-poor play an important role in setting the context for the lives of the poor, through the way decisions are made concerning infrastructure and use of public resources, and through the pervasiveness of their norms. The images the non-poor have of poverty and the poor will influence their relationship with the poor and their willingness to engage in poverty reduction. Their social and moral bonds to the poor will be another factor influencing the politicization of poverty and bringing poverty reduction on the political agenda (de Swaan, 1988).<sup>12</sup>

It is interesting to note that the major part of the objective, subjective, empathic and analytic knowledge about the poor and their lives is found in the literature, classic as well as modern, on the stage and on the screen, and to a certain extent also in the media. It is evident that the abstract world of the poor belongs also to the non-poor. Why this is so is also a matter about which we know very little. How is it that the non-poor take so much interest in abstract poverty that a literary market portraying and analysing misery can be sustained for generations? Is it only the non-poor's built-in fear of becoming poor, their past history, their victory over poverty or the pleasant background it provides for their present lives, which keep this market alive? There are plenty of hypotheses here that can be of use in comparative studies.

#### *Implementational problems*<sup>13</sup>

Those who engage in comparative studies are in for a long time- and energy-consuming process. Linking up with the right kind of partners, sorting out the academic content of the project, and carrying out the many practical details necessary for a successful project, much of it done at a physical and electronic distance with limited face-to-face contact, calls for more patience than most researchers are willing to undertake. Along the way, guidelines have to be established on how duties, responsibilities, resources and results are to be allocated and shared. It is a prime example of decision making under a high degree of uncertainty.

Comparative studies involve per se researchers from different cultures. They are brought up within different frameworks of norms and expectations

and have been subjected to different political and social realities. Within an academic setting it may mean, for example, that the researchers are subjected to different structures of reward and academic loyalties. Some will gain more from adhering to the expectations of their academic institutions, while others may gain more by adhering to the expectations of non-academic or semi-academic institutions. When the different sets of expectations are contradictory, the stage is set for conflicts between the collaborators.

There is a long-standing reluctance to the Western hegemony in the social sciences amongst some third world scholars. Many Latin American social scientists, for example, have for a long time been sceptical of their Western colleagues. In the 1950s and 1960s Western theories of development and modernization, in sociology as well as in political science and economics, zoomed in on the 'undeveloped' countries and paved the way for an analysis coined in Western terms. Latin American scholars in good faith were instrumental in adapting for political implementation the ideas embedded in these theories. The analysis and conceptual tools proved inadequate, theoretically as well as politically, and the results were disastrous (Calderon and Piscitelli, 1990).<sup>14</sup>

African social scientists launched the concept of 'Afro-pessimism'. On the one hand, it expresses the extreme frustration of living in a battered continent, begging the North for mercy, and knowing that the future holds very little in store for the majority of those living in poverty. On the other hand, it expresses a weariness with verbally well-meaning colleagues in the wealthier countries who never become de-coded enough to enter a real dialogue about the specific nature of African culture. Tired of begging for understanding there are now African scholars who have withdrawn from the international scene, to try to develop an 'African social science' (Mutiso, 1991<sup>15</sup>). Only trust and face-to-face contact developed over a long time is likely to help alleviate some of these problems in collaborative research projects. To achieve this aim trade-offs have to be developed, some of which are likely to have an impact on the direction of the research questions, methodologies and choice of data. While these trade-offs are necessary for continued collaboration and implementation of the project, they may not be optimal from a research point of view.

The field of comparative studies on poverty is permeated by other sets of ethical issues that are seldom made visible. These issues run as an undercurrent in the relationship between researchers from affluent countries and poor countries. At times this undercurrent is so strong that it hampers the carrying out of joint studies and influences the results of the studies. It can be argued that studying ethical issues and their impact is part of the methodology of doing comparative studies.

Researchers from the North are on average more affluent and control a more powerful infrastructure than researchers from the South. They are also

brought up within a social science tradition that for a long time has taken its superiority for granted. These circumstances are likely to create an asymmetrical relationship between researchers from developed countries and researchers from developing countries.

In a collaborative research effort such as comparative study, the two or more parties have a common interest in the outcome of the project. They are striving towards a joint framework, whilst at the same time accommodating for personal, local and external interests. This calls for long-term interaction. It also calls for a comprehensive exchange of information. If one party controls more economic resources, more technology, more manpower, more access to library facilities and more expertise than the other party, an asymmetrical relationship is introduced. This asymmetrical relationship can be modified, either by sharing these resources in a more equal manner, or by developing coping strategies that ease the interaction between the parties. In either case it calls for ethical guidelines to be made visible for the parties involved.

A comparative project is an ad hoc formation developed to reach a certain goal. The ordinary stratification patterns and lines of command may not be the best instrument to reach such a goal. There is no evidence supporting the fact that the party controlling the most resources in a comparative research project is also the party best equipped to command the project, but empirically this is a likely outcome. More subtle issues can be just as important for the relationship. For example, who commands the right to give advice to whom? From the outside, donors may interfere in a finely balanced relationship when they assign authority to the party accountable for the use of resources.

A conflict of interest often observed in collaborative research projects with participants from the North and the South is whether the project should be research-driven or action-driven. Researchers from countries where poverty is dominant can rightfully ask if it is fair to emphasize theoretical and methodological issues when so much needs to be done to reduce poverty. It may be difficult to gain acceptance in the surrounding community for time-consuming basic research in an environment where resources are scarce and the social problems overwhelming. Applied research focusing on immediate problems seems to be a more appropriate option than comparative poverty research aimed at a wider understanding of poverty problems.<sup>16</sup>

#### *Vested interests in poverty research*

Still another obstacle to comparative poverty research is located in the many outside interests in the outcome of the research and the consequences the results may have for the outside actors' own interests. The examples are numerous. It is not uncommon for governments to stamp research reports on



poverty confidential, deny researchers and the public access to poverty-related data or to doctor official statistics. It is not uncommon that political parties denounce results showing the depth and intensity of poverty and instead redirect public attention by throwing doubt on the methodology used in the analysis. The Swedish public refused to believe the results of the first level-of-living study because it disclosed serious poverty traps in the best welfare state in the world, and so challenged the methodology used.<sup>17</sup> Conservative groups in Australia did not like the new transfer system implied in the Henderson poverty line and so mounted a ferocious attack on both the methodology and the researchers involved.

Several types of vested interests in how poverty should be defined can be identified. One is tied to policy interests. Those actors who can command a definition of poverty can also influence who are to be the beneficiaries of poverty-reducing measures and how much aid is needed before the beneficiaries are no longer defined as poor. History is full of examples of who are defined as 'deserving poor' and who are to be defined as 'undeserving poor'. In Norway definitions of sorting the deserving needy from the non-deserving can be traced all the way back to the thirteenth century.<sup>18</sup> Wherever an official poverty line is established, it serves the same purpose of sorting the needy from the not-so-needy. The World Bank poverty definition during the last 20 years of 'one-dollar-a-day' has influenced a worldwide understanding of poverty based on a crude and minimalist definition.

Another set of vested interests in poverty definitions are tied to professional interests. The disciplines emphasize and define poverty differently and in accordance with the paradigms within which they work. While there is a general agreement that none of the singular disciplinary definitions describes poverty and the poor adequately, the academic traditions give little room for integrating definitions brought forward in disciplines outside one's own discipline. Rather, it becomes a mark of excellence for some researchers to keep their definitions 'clean'.

For practical purposes a single cause model is often used. When poverty is presented as a lack of access to clean water, then the best poverty-reducing strategy is to invest in wells. When poverty is presented as illiteracy, then basic education is the best remedy. When poverty is presented as moral decay, then birth control and increased policing seems the best strategy.

Statistical units likewise have their vested interests because time series and trend analyses have to be based on past definitions. Since earlier definitions of poverty were characterized by simplicity, in accordance with a more simplified perception of poverty than is the case in academia today, outdated definitions of poverty keep on influencing decisions made on statistical data. For other decision makers, scarcity of data and resources forces the use of simple definitions. Large Western databanks demonstrate their newly won

electronic power to develop still more elaborate and complex indicators that can disseminate a more realistic picture of poverty than hitherto, but this leaves the decision makers unable to cope with the overflow of information and the concrete implementation of the many facts.

International agencies and donors often have their own agenda for poverty intervention. Consultants of many kinds feed on these agencies and develop their own agenda of vested interests.

All these interests, whether crude and direct or low-keyed and indirect, influence our thinking about poverty and the way we relate to poor people. They also affect the design and practicalities of a poverty study. Their impact becomes magnified in a comparative poverty study because the number of actors with vested interests increases, as does the magnitude of vested interests at stake.

### **Gains of comparative studies**

With all these obstacles and problems accounted for above, is it still possible to carry through comparative studies of poverty and other topics across national boundaries? How can the gains of such studies possibly make up for all the methodological, practical, ethical and political barriers that have to be overcome? One answer to these questions is that since comparisons are in the nature of the social sciences then all units ought to be subjects of analysis, including nation-states. Another answer is that there is no other way to go. Neither our methodological tools, nor our theoretical tools, are good enough at present. If we want to develop better tools and more explanatory power we shall need to go on trying them out in different contexts and compare the outcomes. Still another answer is that comparative studies yield additional gains to those performed on smaller and more homogeneous arenas.

### *Increased general knowledge*

So far the major part of poverty research has been carried out within a national context, leaving the impression that causes and manifestations of poverty have their roots in specific cultures. This is partly true, in so far as certain cultures create specific poverty problems, as well as emphasize certain individual and collective responses to poverty and set the limits for poverty-reducing strategies. But poverty can also be seen as a more universal phenomenon that is found in all cultures and whose causes and manifestations get modified through cultural impact. If this is the case, new poverty understanding of a more basic nature can be teased out through comparative studies. There are questions that can only be answered through comparative studies. One set of questions concerns the universal versus the culture-specific aspects of causes of poverty and manifestations of poverty. Which parts of the poverty phenomenon are of such a nature that they can be said to be

inherent in all societies? For example, when causes of poverty are seen to change, do the manifestations stay the same? How culture-specific are certain manifestations and how robust are they to change, as judged from manifestations in other cultures?<sup>19</sup>

One of the immediate gains of comparative poverty studies lies in the simple fact that they help create a better overview of the many different local and national approaches to poverty understanding and make visible the variation in the conditions under which pro-poor and anti-poor strategies may develop. That is in itself valuable, because so far this is scarce and unsystematic knowledge.

All the empirical information from national studies contains data and theoretical elements that are needed for a broader and more general understanding of poverty. While there is no reason to expect any kind of all-embracing social theory for the explanation of poverty (poverty is as diverse a phenomenon as non-poverty), there is still a need to develop a more comprehensive theoretical foundation for the understanding of poverty. National studies alone provide only limited theoretical insights because they tend to get caught in their own cultural paradigms.

Much of foreign aid has not been successful in reducing poverty in the South. The lack of a more fundamental understanding of the complex relationship between causes of poverty, coping strategies of the poor, reactions of the non-poor and the interplay with other social phenomena, makes it difficult to create sustainable social institutions for efficient poverty reduction. It has been argued that donors and others responsible for poverty reduction are not knowledgeable enough to conduct such interventions. That may be true. Like other actors they are likely to be caught in their own cultural and professional paradigms, and sometimes also in their vested interests. But it can also be argued with a great deal of authority that the necessary knowledge for powerful interventions is still not available.

Comparative studies have the advantage that they provide the opportunity to evaluate and rethink all the many elements in the process of poverty production under different cultural impacts (Øyen, 2002). When variations arise in one element in one context and not in the same element in another context, it triggers new hypotheses and explanations. Ideally, the entire sequence of reasoning and project design have to be checked and questions asked whether a variation is due to deficiencies in the research tool, or can be explained through cultural characteristics.

Still another gain of comparative studies is the set of new questions that emerge. This may be particularly true in an under-researched field such as poverty. On the one hand, applied poverty research has a long tradition in the Western world. On the other hand, poverty research in the South is limited and has only developed recently. The voids in poverty research in those

countries have been filled with an understanding of poverty developed in the West. In countries in the South imported hypotheses and methodologies have often led to dead ends, and at times have even been disastrous. In Western countries researchers are now becoming increasingly aware of the shortcomings of earlier approaches. This illustrates not only the fact that all academic import needs to be scrutinized carefully before it is put to use in a different culture. It also illustrates the fact that outsiders pose questions in a different way than insiders, for good and for bad. In principle this is a healthy practice that is encouraged through comparative studies. However, it does call for research partners in developing countries who are strong enough to counter-balance unwarranted Western influences on their endogenous knowledge and regional theorizing.

New questions can be raised concerning globalization. Like so many other social phenomena, poverty formation has increasingly become influenced by global forces. The relationship between those forces and the formation of poverty is at present an open issue, compare for example the comprehensive, controversial and inconclusive discussion on the effects of economic growth on poverty reduction. However, it is not too controversial to argue that changing technology and a more differentiated labour market are but two of the forces that will diminish the opportunities for the poorest and unskilled segment of the population. Global developments can only be studied through an international effort of research projects covering several countries, and preferably as many as possible. Most comparative studies cannot be labelled international since usually they include only a few countries. However, they are the pathways to an internationalization of research. When still more studies are added the contours of a global picture are drawn which can further the understanding of those causes of poverty which are tied to increasing globalization in the economic, political and social sphere.

#### *Country-specific knowledge*

Country-specific knowledge increases through comparative studies. Through a background of studies from other countries national studies can be analysed in a larger perspective and the lacunae of knowledge can temporarily and cautiously be supplemented with knowledge from such external studies. From a policy view comparative studies and the increased contact between experts in the field can provide new inputs on pro-poor policies, and best practices in poverty reduction can be provided. Increased awareness of a shared problem is another benefit that throws light on a more general phenomenon and its solutions.

From another angle comparative studies may help penetrate the moralistic and stereotyped atmosphere that has always surrounded poverty issues. For example, in spite of the many verbal commitments to anti-poverty strategies,

a certain amount of poverty is directly of value for some non-poor groups.<sup>20</sup> When this kind of vested interests documented in one country study match vested interests in studies from other countries, it can become legitimate to shift a causal analysis based on moral deficiency of the poor to an analysis of the non-poor and their role in sustaining poverty. When results of such controversial analyses are repeated in comparative studies they gain a momentum that cannot be brushed off as a national anomaly. Research on poverty among the urban poor in several countries has documented that the poor experience an added vulnerability beyond their actual poverty, because they are exposed to a set of risks stemming from the majority society. Health risks arise from the spatial juxtaposition of industrial pollution, high traffic density, lack of sanitary installations, and a generally poor infrastructure where the poor live and work. Poor people often experience the state in negative ways: as an oppressive bureaucracy that attempts to regulate their activities without understanding their needs, as corrupt police officers, or as planners who make plans without an understanding of how the poor live and survive. As a result poor people tend to avoid contact with official representatives of the majority society, thereby marginalizing themselves further.<sup>21</sup> This picture has emerged through the comparison of results from different studies, and has become part of the generalized knowledge about present day poverty life in the cities. It seems to be a basic pattern with local variations. This is valuable knowledge for people and organizations working towards efficient poverty-reducing measures. Since the knowledge has also been obtained independently in other countries it is likely to have greater validity than isolated knowledge obtained locally. For those who are engaged in poverty reduction it means they can concentrate on sorting out the local variations and seek confirmation of what has been observed elsewhere. Also, it gives the information more credibility, a fact that should not be overlooked in the politics of poverty reduction. Since a phenomenon has been observed in several countries it cannot be as easily ignored and dismissed as a local anomaly. For those working with theory building such parallel phenomena observed through comparative studies provides fertile soil for more general hypotheses about poverty formation.

### **Concluding remarks**

Comparative methodology has not made major leaps forward. This is in spite of refinements in other methodologies, new information technology and masses of empirical data available through huge databases and a myriad of comparative studies. The shortcomings are such that the yield of comparative studies can rightly be questioned. At the same time it can be argued that there are other sizeable gains in carrying out comparative studies. They increase general knowledge, offer a critical background for limited national studies, and

provide the opportunity to raise new issues. Altogether the 'migration of ideas' expands the horizon of researchers and users of the studies.

Other indirect effects of comparative studies are the dissemination of expertise and country-specific insights that are created throughout a project where partners from different countries work together over a lengthy period. Successful cooperation tends to create sustainable networks and continued exchange of knowledge. This is a form of globalization that most academics are likely to welcome.

It is interesting to note that researchers who engage in comparative studies of poverty after a while seem to go beyond their disciplinary borders, break with traditional ways of thinking and develop a broader spectre of academic expertise than that found in their original discipline. This seems to be particularly true where comparative studies involve partners in the South whose education is less mono-disciplinary. This gives reason to develop a hypothesis that increased internationalization in research experience is one avenue towards increasing interdisciplinarity.

## Notes

1. Comparisons are here defined as comparisons between countries/nations.
2. More than a decade ago I edited a book where a group of experts in the field wrote essays that updated our knowledge about the then current methodology of comparative studies. Those essays are still very relevant: Øyen (ed.) (1990). Some of the writings on comparative methodology still in use as textbook material date back to the 1970s and 1980s and include Przeworski and Teune (1970); Macintyre (1973); Ragin and Zaret (1983); Ragin (1987); Collier (1991); Collier and Mahon (1993) and Dogan (1994).
3. This is an area that demonstrates all the problems of comparative research. It is also the one with which I am the most familiar; see [www.crop.org](http://www.crop.org) for more information on CROP, The Comparative Research Programme on Poverty.
4. These and several other methodological problems of the same kind are well documented in the social science literature and need not be further discussed here.
5. Michael Ward, 'Perceptions of Poverty: The Historical Legacy', Paper presented at International Conference on What Can Be Done About Poverty?, IDS, Sussex, June 1998.
6. Robert Chambers (1996).
7. David Gordon and Paul Spicker (eds) (1998). The volume is now under revision in order to incorporate newer definitions, in particular in Latin America.
8. Else Øyen et al. (2002).
9. See for example Erik Oddvar Eriksen and Jørn Loftager (1996).
10. T.H. Marshall (1964); Richard M. Titmuss (1968).
11. Oscar Lewis (1966); Daniel P. Moynihan (ed.) (1968); Frances Fox Piven and Richard A. Cloward (1971); John Rawls (1971); Herbert J. Gans (1972).
12. Abram de Swaan (1988).
13. The discussion in this part of the chapter is based on Else Øyen (1996).
14. F. Calderon and A. Piscitelli (1990).
15. Roberta M. Mutiso, Nairobi, Kenya, private conversation 1991.
16. In order to get around this difficult issue, the concept of 'action research' has developed as some kind of compromise. On the one hand, action research lends it legitimacy from the fairly prestigious arena of academic knowledge production. On the other hand, action research gets legitimacy through its moral emphasis on intervention. However, the loss of mixing two incompatible strategies outweighs the gain of two compatible and valuable goals, and a sound methodology for action research has not yet been developed.

17. Sten Johansson (1970).
18. Magnus Lagabøtes landslov 1274–76. (Law given by King Magnus the Lawmaker.)
19. Else Øyen (1992).
20. Gans (1973).
21. Ellen Wratten (1995); World Bank (2000).

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