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ISSUE 3 January 2008



**Chronic Poverty
Research Centre**

Intergenerational Transmission of Poverty

Research Brief

INTRODUCING THE RESEARCH BRIEF

The Intergenerational Transmission (IGT) of Poverty Theme at the Chronic Poverty Research Centre (CPRC) promotes research and discussion on the drivers, maintainers and interrupters of intergenerational and life-course poverty. This third Research Brief reviews the findings of several recently commissioned papers, drawing out their implications for understanding, explaining and developing policy against childhood, life-course and intergenerationally transmitted poverty. Details of these papers and where to find them on-line can be found at the end of this brief.

The CPRC-IGT team welcomed a new colleague at the end of 2007. Kate Higgins is based at the Overseas Development Institute (ODI) in the Poverty and Public Policy Group, and has contributed several pieces to this research brief.

Kate Higgins is a political economist with significant development research and aid management experience. Her research interests are policy responses to chronic poverty and the intergenerational transmission of poverty; enhancing service delivery to marginalised groups and areas; pro-poor growth; labour, migration and poverty; and the poverty impacts of conflict and forced migration. She primarily adopts qualitative methods in her research but is interested in and committed to Q-Squared approaches. Prior to joining ODI, Kate worked for the Australian Agency for International Development (AusAID) on the Papua New Guinea governance program and the Indian Ocean tsunami response. She has also worked with the Norwegian Refugee Council's education program in Northern Uganda, the Burmese Migrant Workers' Education Committee on the Thai/Burma border, and with remote aboriginal communities in northern Australia.



Family in Simen Mountains in northern Ethiopia
Katrin Bircher, 2004.

THE INTERGENERATIONAL TRANSMISSION OF POVERTY: AN OVERVIEW

Kate Bird, theme coordinator of the Intergenerational Transmission of Poverty Theme within CPRC, has recently published *The Intergenerational Transmission of Poverty: An Overview*. This working paper consolidates current thinking on IGT issues, identifies gaps in knowledge relating to IGT poverty and suggests a research agenda for work on IGT poverty within the CPRC. The key concern of the paper is in identifying factors and processes that, within the context of the broader economic and socio-political context, determine the poverty status of individuals and their households, the likelihood that poverty is passed from one generation to another, and the potential 'poverty trajectories' for those growing up in poor households. This paper should be a key reference for those interested in IGT poverty issues. Details on where to download it are at the end of this research brief.

UNDERSTANDING THE LINK BETWEEN IGT POVERTY, POVERTY ESCAPES AND POLITICAL ECONOMY

Studies of the intergenerational transmission of poverty (IGT) often focus on household and intra-household level factors which affect IGT and its interruption. Yet during the two generations necessary for the study of IGT, 'context' changes radically. In Lucia da Corta's paper *Concepts and Methods to Understand the Link Between the Intergenerational Transmission of Poverty, its Interruption and Political Economy*, she suggests concepts and methods necessary to link IGT analyses to an analysis of external 'changing context' through multi-generational life histories structured on an updated, critical realist political economy perspective.

The paper critically reviews existing Q-squared studies on chronic poverty based on panel and life history analysis. Those studies which construct livelihood trajectories are found to be enormously useful for revealing *sequences* of impoverishing or enriching events and strategies leading up to downward or upward mobility over the life course, lending some preliminary insight into *causal processes*. However, because there is a tendency to follow the methodological individualism of the panel and rely heavily on actors' accounts, such studies might be relatively weaker in the analysis of transforming social relations which underpin the deeper causes of changes in poverty status. These studies can benefit from more determined, supplemental research into:

- ▶ Intra-household *conjugal and generational relations* which affect the intra-household distribution of health, nutritional

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and educational investments during different phases of childhood and at inheritance. Such distributions can strongly influence subsequent mobility trajectories for each household member;

- ▶ Extra-household relations of 'adverse incorporation and social exclusion' (AISE) in different institutional arenas including market, state and civil society shaped by intra-household domestic relations, gender, class, caste, ethnicity and age.

Both sets of social relational concepts help to restore the dialectic between the agency of actor's strategies and the structural constraints placed on them in their relations with the more powerful.

da Corta suggests it might be useful to organise research on a quantitative—qualitative cubed approach, where quantitative analysis of panel data on mobility and correlated characteristics (Quantitative) is linked via households from the panel to multi-generational life histories which capture:

- ▶ An individual's livelihood strategies taken over their life course and their accounts of change (livelihood trajectories) (Qualitative 1);
- ▶ Linked to that individual's changes in social relations over their life course, within and outside the home, and the discursive bases of such relations (Qualitative 2);
- ▶ Linked to an analysis of the circumstances surrounding changing social relations through systematically linking such changes to local and macro contextual events and trends. Crucially this requires interviewing elites (Qualitative 3).

METHODS FOR UNDERSTANDING THE INTER-GENERATIONAL TRANSMISSION OF POVERTY: FAMILY HISTORIES AND RECALL METHODS

The IGT theme of the CPRC has been pursuing research to identify creative and effective research methods for understanding IGT poverty. Part of the CPRC's research programme over the period 2007-2010 is to undertake IGT research using quantitative panel studies triangulated with qualitative life history interviews. The working paper *Using Family Histories to Understand the Intergenerational Transmission of Poverty*, by Robert Miller, captures his family history methodology research and proposes a method of collecting family histories which links households from panel studies with individual life histories. Miller argues that in researching the IGT of poverty, family histories would augment panel studies in a number of ways:

- ▶ by placing quantitative findings into a context of expressed meaning;
- ▶ by providing a holistic view of the family, useful for investigating issues such as whether there is a 'family strategy' for mobility;
- ▶ by extending the space dimension provided by household panel data to households and individuals within the same family but located separately;
- ▶ by extending the time dimension provided by panel data, through the retrospective recall of events and the prospective anticipation of the future; and
- ▶ by allowing for the direct examination of generational change in the family and the persistence of poverty across generations of the same family.

Lucia da Corta, in her methodological note *Using Recall to Understand the Intergenerational Transmission of Poverty*, explores how recall methods can help jog people's memories and enable them to periodise and quantify historical data. Such methods can be used to create or extend panel data - i.e. both broaden the range of variables and to extend further back into the past. Recall methods also enable one to link individuals or households in the panel to their family histories, their accounts of changes in poverty status and to the change in social relations which underpin such poverty. In her paper, da Corta focuses on methods for:

- ▶ *Periodisation* – by gathering preliminary macro, meso and local histories through focus group discussions and by beginning each family history with genealogical events. This provides the crucial 'armoury' of reference points necessary to periodise each family history and hence to more deeply understand the IGT poverty and escapes;
- ▶ *Quantification and Ranking* – methods to encourage people to list, rank and estimate proportions of historical economic variables *within local ways of thinking about scale*; and
- ▶ *Identifying important dates and magnitude of change in power relations* – methods which encourage people to identify the terms of their 'social contracts' – rights, responsibilities and penalties for non-cooperation– and to date and describe how they change. We encourage them to focus on *memorable turning points or points of conflict* when such relations change – enabling escapes from IGT poverty or deepening poverty. Focussing on turning points also enables a *flow* of data on social relations, which is necessary to complement panel flows.

She concludes with the limits of recall methods.

Contributors:

Lucia da Corta is an agricultural development economist and Research Associate at the Department of International Development, Queen Elizabeth House, Oxford. Her early research at St. Antony's College, Oxford was on long-term economic mobility and agrarian change in south Indian villages. She later experimented with the econometric aspects of panel data analysis on economic mobility at the University of Manchester. Difficulty with identifying the deeper causes of enduring poverty encouraged her to pursue research on the dynamics of Indian agricultural labour markets focusing on unfreedom, the feminisation of agricultural labour in south India and heavy use of unfree child labour in cottonseed farming. This research was carried out during a Junior Research Fellowship at St. Anne's College, Oxford and alongside teaching at the London School of Economics. Lucia is also a member of the editorial advisory board of *The Journal of Peasant Studies* and principal advisor to Glocal Consultancy in Hyderabad, Andhra Pradesh. She is currently working on the Chronic Poverty Research Centre's Comparative Life History Project (a research project linking national panels to freshly gathered, in-depth life histories).

Robert Miller is Professor in Sociology at the School of Sociology, Social Policy and Social Work at Queen's University of Belfast. He studied at Duke University and the University of Florida and completed his PhD at the Queen's University. His main sociological work has been in the areas of social stratification and mobility, and gender and political participation. He has contributed to the social policy debate surrounding equal opportunity issues in Northern Ireland - most notably with a highly controversial study of religious discrimination in the Northern Irish Civil Service that led directly to major reforms in that body. He presently has returned to his long-standing interest in social mobility, employing the qualitative



methods of family history and (auto)biographical research. He has been involved with the European Sociological Association since its founding having been its General Secretary 1997-99 and Chair of the ESA Research Network 'Biographical Perspectives on European Societies' (www.valt.helsinki.fi/esa/biog.htm). Robert Miller is Convener of the Masters in Social Research Methods and is Deputy Director of ARKive, a joint initiative of Queen's University and the University of Ulster dedicated to making social science information more accessible to the general public (www.ark.ac.uk).

ASSETS AND IGT POVERTY—INHERITANCE AND INTRA-HOUSEHOLD DYNAMICS

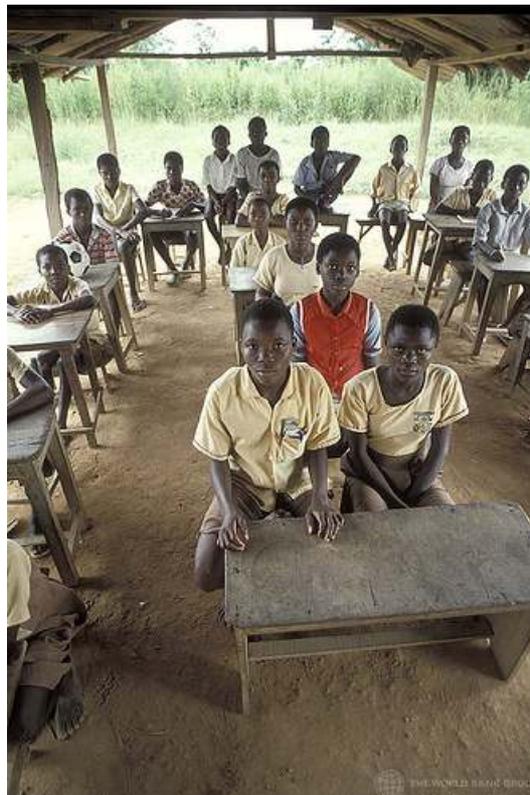
As the July 2007 *Research Brief* highlighted, we know that an insufficient quantity and quality of assets are a central means through which poverty persists throughout the life course of an individual or household and is 'transferred' from one generation to the other.

To further explore the relationship between assets and the intergenerational transmission of poverty, three literature reviews and select annotated bibliographies have been recently commissioned by the CPRC. Elizabeth Cooper and Diya Dutta explore these issues in the context of inheritance practices, in Africa and Asia respectively. Laia Soto Bermant explores these issues in the context of intrahousehold assets dynamics.

Cooper presents a review of past and current empirical and theoretical scholarship and policy analysis concerning the *de jure* and *de facto* rules and norms of inheritance practices in African societies, particularly with regard to physical assets, and their effects on IGT poverty. She identifies recent scholarship which has contributed to the case for investigating the links between inheritance systems and IGT poverty; so-called 'traditional' inheritance practices among particular societies in Africa; legal and socio-political contexts within which inheritance systems in African countries operate, and how and why inheritance rules and practices change; gender inequality and inheritance systems; and the poverty effects of exclusionary inheritance rules and practices on vulnerable groups, covering widowed women, children and household affected by HIV/AIDS.

Dutta takes a strong gender approach to her paper on inheritance practices and IGT poverty in Asia. The paper explores definitions, concepts and methodologies applied to the study of chronic poverty and inheritance practices; theories of inheritance; approaches to inheritance (including primogeniture, patrilineal and matrilineal inheritance practices); the relationship between marriage, the family and the household and inheritance; tradition and contemporary change in land and housing inheritance practices; and finally, inheritance in Asia in relation to the vulnerable (exploring gender and spousal inheritance, and the case of widows specifically).

Soto Bermant's paper on intrahousehold asset dynamics and their effects on IGT poverty reviews differential intrahousehold access to and control of assets and its short and longer run effects, including on IGT poverty. The paper discusses the links between poverty and asset dynamics; the main factors shaping the intrahousehold allocation of assets and resources; asset dynamics and its effects on IGT poverty, specifically in relation to agriculture and land, health and nutrition and human capital and education; and the importance of taking into account social norms and cultural contexts in the study of intrahousehold allocation and poverty dynamics. Soto Bermant emphasises the value of anthropology in



Young children in school in Ghana
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CPRC RESEARCHER CONTRIBUTES TO PLAN'S CAMPAIGN AGAINST VIOLENCE IN SCHOOLS

Research to be published later this year will shed new light on efforts to prevent school-based violence. It will combine a systematic review of existing literature on school violence with an analysis of existing legislation across the world and interviews with key governmental and non-governmental informants in developing countries. In particular, the study will examine the extent of two of the most damaging forms of violence, bullying and sexual abuse. It will identify gaps in current knowledge about school violence and differences between the threats faced by children in Africa, Asia and Latin America.

The study was commissioned by Plan, a leading children's NGO, and is co-authored by Nicola Jones (ODI), Karen Moore (CPRC), and independent consultant Eliana Villar-Marquez. In October, the report will be presented at the launch of Plan's **Learn without Fear** global campaign to stop violence in schools. For more information about this campaign, visit: www.learnwithoutfear.org.



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New Conference—**Rethinking Poverty: Making Policies Work for Children**

21-23 April – *Rethinking Poverty: Making Policies Work for Children* conference will be hosted by UNICEF and the Graduate Program in International Affairs (GPIA) at the New School in New York. The conference will create space for consultation and exchange between academics, professionals and government officials working on different aspects of the fight against child poverty. The conference will also provide input and feedback to UNICEF's Global Study on Child Poverty and Disparities, which is currently being carried out in 40 countries. For further details, please see <http://www.unicefglobalstudy.blogspot.com/>.

New website—Equity for Children

The Equityforchildren.org Project, an initiative recently launched in conjunction with the Graduate Program in International Affairs (GPIA) - The New School. Students, professors, academics and practitioners are invited to exchange information and disseminate knowledge on child poverty, rights, social and minority disparities, evaluation in the context of development, and art and culture projects created by children.

New campaign—Age Demands Action

Older people in 25 countries will meet with governments on 1st October 2008, *UN International Day of Older Persons*, as part of *Age Demands Action*, the first ever globally coordinated activity by older people to press for change. In a campaign led by *HelpAge International*, older people will call for improvements in ageing policies and practice in their countries. They will also demand a package of universal non-contributory pensions, free health care and anti-discriminatory legislation for all older people worldwide. For further details, please see www.helpage.org/Researchandpolicy/AgeDemandsAction.



Medical check-up in India
© Ray Witlin / World Bank

Since our last newsletter, several papers with a focus on issues relating to the intergenerational transmission of poverty have been commissioned and published by CPRC.

Bird, K. (2007) *The intergenerational transmission of poverty: An overview*. Working Paper 99. Manchester: IDPM/Chronic Poverty Research Centre (CPRC). Available at: www.chronicpoverty.org/resources/cp99.htm.

Cooper, E. (2008) *Inheritance practices and the intergenerational transmission of poverty in Africa—A literature and select annotated bibliography*. Forthcoming Working Paper/Annotated Bibliography. Manchester: IDPM/Chronic Poverty Research Centre (CPRC). Will be available at: www.chronicpoverty.org/resources/working_papers.html.

da Corta, L. (2008) *Using Recall to Understand the Intergenerational Transmission of Poverty*. Forthcoming Working Paper. IDPM/Chronic Poverty Research Centre (CPRC). Will be available at: www.chronicpoverty.org/resources/working_papers.html.

da Corta, L. (2008) *Concepts and Methods to Understand the Link Between the Intergenerational Transmission of Poverty, its Interruption and Political Economy*. Forthcoming Working Paper. IDPM/Chronic Poverty Research Centre (CPRC). Will be available at: www.chronicpoverty.org/resources/working_papers.html.

Dutta, D. (2008) *Inheritance practices and the intergenerational transmission of poverty in Asia—A literature and select annotated bibliography*. Forthcoming Working Paper/Annotated Bibliography. Manchester: IDPM/Chronic Poverty Research Centre (CPRC). Will be available at: www.chronicpoverty.org/resources/working_papers.html.

Miller, R. (2007) *Using Family Histories to Understand the Intergenerational Transmission of Chronic Poverty*. Working Paper 103. Manchester: IDPM/Chronic Poverty Research Centre (CPRC). Available at: www.chronicpoverty.org/resources/cp103.htm.

Soto Bermant, L. (2008) *Intrahousehold asset dynamics and its effects on the intergenerational transmission of poverty—A literature and select annotated bibliography*. Forthcoming Working Paper/Annotated Bibliography. Manchester: IDPM/Chronic Poverty Research Centre (CPRC). Will be available at: www.chronicpoverty.org/resources/working_papers.html.

FOLLOWING UP This and suggestions to karen.moore@manchester.ac.uk. See www.chronicpoverty.org for copies of this Research Brief and other resources. To contact us, join the CPRC mailing list, or receive this newsletter by email or post, email us at karen.moore@manchester.ac.uk.

