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WELLBEING IN DEVELOPING COUNTRIES: CONCEPTUAL FOUNDATIONS OF THE WeD PROGRAMME

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WeD - Wellbeing in Developing Countries ESRC Research Group

WeD is a multidisciplinary research group funded by the ESRC, dedicated to the study of poverty, inequality and the quality of life in poor countries. The research group is based at the University of Bath and draws on the knowledge and expertise from three different departments (Economics and International Development, Social and Policy Sciences and Psychology) as well as an extensive network of overseas contacts and specific partnerships with institutes in Bangladesh, Ethiopia, Peru and Thailand. The purpose of the research programme is to develop conceptual and methodological tools for investigating and understanding the social and cultural construction of well-being in specific countries.

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SUMMARY

The research programme of the ESRC Research group on Wellbeing in Developing Countries (WeD) at the University of Bath was founded on three conceptual frameworks: Human Need Theory, the Resource Profiles Framework, and Quality of Life Research. This paper provides a detailed conceptual overview of each of these in sections 2, 3 and 4. The introduction seeks to justify a wellbeing/ illbeing approach to the traditional concerns of poverty in developing countries. The conclusion summarises the links and tensions between these approaches. The intention is to provide a solid conceptual foundation for the remaining stages of the ongoing WeD programme. This includes a conceptual synthesis of the idea of wellbeing applicable to development contexts; a suitable methodology and suite of research instruments to study wellbeing; and the generation of significant, reliable and meaningful data and findings in our four research countries. This paper is a revised and abbreviated version of Chapter 1 of the forthcoming book, *Wellbeing in Developing Countries: From Theory to Research*, edited by Ian Gough and J Allister McGregor, to be published by Cambridge University Press.

Key Words: poverty, wellbeing, development, quality of life, human needs and capabilities, resource profiles, livelihoods

1. DEVELOPMENT AND WELLBEING: INTRODUCTION

At first sight it appears incongruous to discuss wellbeing in relation to developing countries. Most often, and properly, our attention and concern is for the many people who experience suffering as a consequence of their poverty. However, there are a number of reasons why it is important to confront this apparent incongruity. The first is to acknowledge the fully rounded humanity of poor men, women and children in developing countries; recognizing that they are not completely defined by their poverty, nor can they be fully understood in its terms alone. Poor people in developing countries strive to achieve wellbeing for themselves and their children. For the poorest, and in the worst instances, this will largely be a struggle to limit the extent of their illbeing and suffering. But even alongside deprivations, poor men, women and children are able to achieve some elements of what they conceive of as wellbeing, as Biswas-Diener and Diener (2001) demonstrate; without this, we would argue, their lives would be unbearable. Furthermore, it is striking that the non-poor in developing countries can often experience what appear to be high levels of life satisfaction. Wellbeing is far from an irrelevant concept in the study of international development.

From this perspective the notion of poverty (or rather poverties) has a number of limitations and the literature around it is becoming increasingly complex and to some extent muddled. There are discussions and debates over many different types of poverty; from consumption to income poverty; to poverty defined in terms of the human development index or by social exclusion. Poverty can be relative or it can be absolute. We contend that ‘wellbeing’ (including its inevitable obverse of illbeing) is a wider concept that can usefully encompass and connect these debates over different types of poverty. This does not entail abandoning concepts of poverty; they all have their different analytical and policy uses, but that we locate them in a wider discourse about wellbeing.

Current efforts to champion notions of multi-dimensional poverty reflect wider shifts in thinking about international development. Over time the global community has in effect been moving towards conceiving ‘development’ as the organised pursuit of human wellbeing. This has

involved broadening the notion of development from a narrow economic conception, to encompass human development and wider ideals such as participation and freedom. At its broadest and most utopian, the objective of international development could be described as the creation of conditions where all people in the world are able to achieve wellbeing. Thus the purpose of development policies and the *raison d'etre* of governments and the agencies that generate and implement the specific policies and programmes, is to work to establish those preconditions in different societies. The Millennium Goals Declaration can be seen as motivated by a minimal version of such a radical goal.

Of course, this all begs the question: what do we mean by wellbeing? The older English term 'welfare' can be traced back to at least the fourteenth century, when it meant to journey well and could indicate both happiness and prosperity (Williams 1983). In the twentieth century it gradually came to be associated with the assessment of and provision for needs in the welfare state, and acquired an increasingly objective, external interpretation. But in the latter decades of the century new discourses on agency, participation, and multi-dimensional views of poverty paved the way for a reinvention of the older notion of wellbeing, which can be traced back to Aristotle and the Buddha. Perhaps unsurprisingly, the nature of wellbeing is by no means agreed. The new edition of the usually concise and parsimonious *Oxford Companion to Philosophy* (Honderich 2005) has difficulty in defining its meaning: 'Variously interpreted as "living and faring well" or "flourishing", the notion of wellbeing is intricately bound up with our ideas about what constitutes human happiness and the sort of life it is good to lead'.

This suggests that wellbeing is an umbrella concept, embracing at least 'objective wellbeing' and 'subjective wellbeing', although this very distinction is contentious and potentially problematic. Gasper (2007) defines the former as 'externally approved, and thereby normatively endorsed, non-feeling features of a person's life, matters such as mobility or morbidity'; and SWB as 'feelings of the person whose wellbeing is being estimated'. He goes on to make finer distinctions between seven categories and eleven subcategories of wellbeing, including 'wellbeing as activity' (Bruton 1997). The conclusion of his and our mapping work is to accept plurality; wellbeing is still a novel category in applied social science, such that no settled

consensus on its meaning has yet emerged.[1] It is, however, a useful umbrella term, beneath which a variety of related ideas and concepts can shelter.

We argue here for a conception of wellbeing that takes account of the objective circumstances of the person and their subjective evaluation of these. But both the objective circumstances and perceptions of them are located in society and also in the frames of meaning with which we live. Thus wellbeing is also and necessarily both a relational and a dynamic concept. States of wellbeing/illbeing are continually produced in the interplay within the social, political, economic and cultural processes of human social being. It cannot be conceived just as an outcome, but must be understood also as a process.

Across the social science disciplines there are many diverse contributions to contemporary debates over wellbeing. At the same time the term has a potentially important communicative function to play for both the social sciences and for policy discourses. WeD is intended to provide a space for some of this interdisciplinary debate about what we mean by wellbeing and what its relevance is for both academic study and policy.

Inasmuch as it evokes competing visions about what it might mean to live well, wellbeing must be considered in relation to wider conceptions of *development* as 'good change' (cf. Chambers 1997). But understandings of and prescriptions for development depend on and change with dominant conceptions of wellbeing. The dominant conception in the modern, post-war development era has been an economic one – wellbeing comprises the material resources people control and can utilise and dispose of, measured by income and at aggregate levels by national income per head. But as we have indicated, over the last two decades this has been challenged at the level of conceptual argument and, equally important, measures and indicators. This paper is structured around three particular challenges and seeks to relate them to each other and build from them.

[1] Amartya Sen uses 'wellbeing' in a distinct way to refer to 'a person's being seen from the perspective of her own personal welfare', as contrasted with 'agency goals', which can include other goals such as pursuing the welfare of others (Sen 1993: 35-36). This usage does not appear to be a common one and we shall not follow it here.

From money poverty to human development. First, the idea of development has been extended from economic to human development. This has long been a theme of heterodox writers, critics and activists from Gandhi through Dudley Seers, ul Haq and others, but undoubtedly it was the welfare economist and Nobel prize-winner Amartya Sen who played a notable role in placing such ideas on the global agenda in the last quarter of the last century. Sen disputed that command over commodities or income could provide an adequate space within which to assess wellbeing or poverty. This was to confuse a means with more basic ends, and to grasp the latter, new concepts were required. Sen initially identified the ends of human life as human capabilities and functionings – what people are notionally able to do and to be, and what they have actually been able to do and to be. At the most general level we should thus evaluate the extent of people's freedom to live the kind of life which they have reason to value (see Robeyns 2005 for a clear introduction to his approach).

The philosopher Martha Nussbaum (2000) has taken the idea further to embrace numerous non-economic aspects of life such as the expression of imagination and emotions, affiliation and play. In 1991, Doyal and Gough contributed an alternative theory of basic human needs and identified health and autonomy as universal pre-requisites for wellbeing, whatever is our more substantive notion of wellbeing. Both they and Nussbaum espouse a universal list of basic needs/ capabilities, which is open to variable expression in different contexts. The last decade of the last century saw a renewed interest in these ideas. Since 1990, the annual Human Development Reports have monitored international progress in meeting a range of basic needs and extending basic capabilities. In 2004 the new international Human Development and Capability Association was formed to foster this perspective.

From money poverty to resources and agency**.** Second, the 1990s saw the emergence of a range of different 'livelihoods frameworks' (Rakodi 1999). These took account of the ways people make use of a wider range of 'assets' and strategies than had previously been absorbed in formal micro-economic models. The frameworks had some common points of departure, in particular Sen's publications in the early 1980s on entitlement, and work on vulnerability by a range of authors, and championed by Chambers. Sen's interpretation of modern famines as due to the decline of entitlements with which people acquire food stimulated a broader notion of vulnerability (Sen 1981a). This broader framework encompasses not just economic, but social

and political vulnerability and prompts a richer analysis of the resources people utilise to mitigate their vulnerability. These extend beyond monetised commodities and certain public services to include human capital, natural capital and later on social capital.

Placing greater emphasis on the social and cultural dimensions of the exercise of agency in the struggle for livelihoods, researchers at the University of Bath developed the Resource Profiles Framework (RPF) to generate a bottom-up perspective for comprehending what different people actually do in the round of their lives, in order to secure not only a livelihood, but also a meaningful and bearable form of life for themselves. This differed by using the concept of resources rather than capitals or assets, where resources are understood as socially and culturally negotiable[2]. Anticipating the discussions of wellbeing here, the resource profiles framework recognised that a far wider range of things, such as relationships (including adverse relationships like clientelism) and cultural status, can also be both means and ends. It also provides a more realistic framework for handling people's reactions to rapid change in today's world. It can be argued that the present globalising world differs from earlier stages of modernisation in the sheer rate and complexity of change that it presents – and most notably for poor countries and peoples. This presents a challenge to development thinking, and highlights the need for approaches that will help us comprehend how different people cope with rapid change – change which often goes to the core of their very identity (Lawson, McGregor and Saltmarshe 2000).

From money poverty to subjective wellbeing and quality of life. The third, more recently ascendant challenge has returned to the individual subject, to substantially question the ends of development and how we conceive and measure them. The related ideas of 'Subjective Wellbeing', 'Life Satisfaction', 'Quality of Life' and 'Happiness' have brought subjective evaluations centre-stage and propose to measure these directly rather than via proxies such as resources or human development. This perspective has been developed in different disciplinary bases, notably health services research into health-related quality of life, the psychology of hedonic balance and life satisfaction, and the economics of happiness. By the start of the millennium some of these strands were fusing and cross-fertilising in

[2] Five categories of resources are identified – material, human, social, cultural and natural (or environmental).

inter-disciplinary arenas such as the International Society of Quality of Life Studies (ISQOLS) and the Journal of Happiness Studies. Though the vast bulk of such work has been disconnected from development issues, there is a close but as yet little explored affinity between this research and the literature on participation in development. The merger between these streams is forming the third fundamental challenge to narrow economism in thinking about wellbeing and development.

The research programme of the ESRC Research group on Wellbeing in Developing Countries (WeD) at the University of Bath was founded on these three conceptual frameworks. The forthcoming book will be the first to address and relate all three. The volume builds on a small international workshop held at the Hanse Wissenschaftskolleg in Germany, where we were privileged to hear leading researchers report on and evaluate the state-of–the-art in understanding wellbeing from different disciplinary perspectives. The book brings together papers by key international contributors to the three movements described above alongside contributions from WeD researchers.

An important feature of the WeD research is its inter-disciplinary range: the programme embraces anthropology, economics, political theory, psychology and sociology. WeD is built on the premise that cross-disciplinary communication and understanding is necessary to conceptualise human wellbeing; to research it; and to debate the policy implications of it.

The remaining sections of this paper review the three bodies of literature which were the starting points for this study of wellbeing. The final section summarises the links and tensions between the approaches and prepares the ground for a subsequrnt WeD paper which will provide a systematic and synthetic conceptual model and research methodology.

2. HUMAN NEEDS AND CAPABILITIES

The concept of human needs has for long been a cornerstone of development thinking. The idea that there is a core set of basic needs which must be satisfied if we are to consider development to have taken place stretches back to colonial government policy. It has long underpinned national strategies for development in major third world countries such as China and India. But the idea did not gain notable momentum in

international development policy until 1976, when the International Labour Organisation adopted a Declaration of Principles and Programme of Action for a Basic Needs Strategy of Development and in 1978 when the World Bank initiated work on basic needs. These initiatives marked some of the first global institutional responses to the inadequacies of Gross Domestic Product (GDP) and economic growth as measures of either development or human welfare. As a measure of development GDP is limited because of the restricted conception of resources which it uses. As a measure of welfare the problems of per capita GDP are legion: it takes no account of the composition of output between need satisfiers and luxuries (nor between those elements of consumption which are 'good' or 'bad'); nor of the distribution of welfare between groups and within families; nor of the direct impact of production on human wellbeing; nor of the side-effects of production on the environment and the biosphere and hence of the sustainability of future production and welfare. A critical and imaginative response to these omissions was long overdue. Yet by the mid 1980s the basic needs movement was starting to founder[3]. Why?

At one level it fell victim to the resurgent neo-liberal wave that had been building through the post-war years and gained ascendancy in the early 1980s. The ability of states to authoritatively define what it was that people needed was heavily questioned; needs were only legitimately expressed as the preferences of individuals in markets. But it was also criticised from very different ideological perspectives. Critics from developing countries regarded the basic needs idea with suspicion, seeing it as a further example of post-imperial patronisation and cultural imperialism. Illich (1992: 88) wrote: '"Basic needs" may be the most insidious legacy left behind by development' (quoted by Gasper 2004: 153). Others saw the needs agenda as a means of blunting their demand for a New International Economic Order. The *dependista* thinking which was prominent at the time instead stressed structural considerations and the prior necessity for developing countries to reduce their economic dependence on the West.

[3] This is not to deny the range and quality of writings on the topic that appeared in the 1980s; both conceptual, including Braybrooke 1987, the important collection edited by Lederer 1980, Plant et al 1980, Spingborg 1981; and those relating needs to development, including Max-Neef 1989, Stewart 1985, Streeten 1984, Wisner 1988. Furthermore many countries and NGOs continued to inhabit and develop the needs discourse; but it disappeared for a time as a global discourse.

The basic needs thinking of the time appeared particularly vulnerable to two sets of critiques from quite different sources: from economists' criticisms of needs as opposed to wants met through markets, and from growing post-modern currents critiquing its so-called arbitrary postulates about human nature from a relativist perspective (Doyal and Gough 1991; Gough, McGregor and Camfield 2007; Bebbington *et al* 2007). In sum, as Des Gasper (2007) notes, the fall of basic needs theory reflected its lack of conceptual depth, technical refinement, and an appealing political language suited to its time.

Now basic human needs are back on the political map. The UN Summit on Social Development in Copenhagen in 1995 agreed on a set of targets for tackling world poverty over the next twenty years, and five years later the Millennium Declaration was adopted by the General assembly of the United Nations in September 2000. The accompanying Millennium Development Goals (MDGs) go on to set targets and identify indicators for many basic needs, for example survival (e.g. infant mortality), health (e.g. prevalence of HIV/AIDS and malaria), hunger, access to safe water, and education (literacy and primary school enrolment).

The revitalisation of the basic needs movement at this time requires some explanation. Perhaps most obvious is the accumulating evidence on the persistence of extreme poverty among many people around the world. Despite years of experimenting and spending on development programmes, the stark reality is that in many countries, and especially those in Sub-Saharan Africa, there has been at best modest growth coupled with increasing poverty. In some other countries whose economies have enjoyed growth the impact on poverty has been disappointing. At another level, the end of communism and the Cold War has ushered in a quite novel form of global order, one where new inequalities threaten the stability of capitalism yet without the alternative vision provided by state socialism. In these circumstances ideological opposition to basic needs and social rights becomes otiose or even counter-productive.

A final explanation for the rebirth of interest in basic needs has been new conceptual thinking, most influentially in the work of Amartya Sen. In a series of publications and lectures (beginning with the *Tanner Lectures* at Stanford University in 1979b), Sen has presented the case for viewing wellbeing, alongside poverty and suffering, in terms of human functionings and capabilities. This approach breaks with traditional economics, which

typically conflates wellbeing with either utility (happiness, satisfaction, desire-fulfilment) or with resources (income, wealth, commodity command). In effect, he inserts a chain of new concepts to bridge the gap between these two poles as follows:

Commodities → *Commodity Characteristics* → *Capability to function* → *Functioning* → Utility

Drawing on Lancaster's work (1966) he distinguishes between a commodity and its set of characteristics or desirable properties (see also Max-Neef 1989). A meal, for example, may have the properties of satisfying hunger, establishing social contacts or providing a focus for household life. Conversely, a number of distinct commodities will often share one or more characteristics, as when all (or most) foodstuffs have the characteristic of satisfying hunger. More significantly, he introduces the important new concepts of functioning and capability. A *'functioning'* is 'an achievement of a person: what she or he manages to do or to be' (Sen, 1985a:12). Sen's initial claim was that a person's wellbeing should be viewed in terms of the totality of 'beings' and 'doings' she or he actually achieves. Going further, a person's *capability* set represents the vector of all the different functionings she or he is able to achieve. It is distinct from functioning (bare achievement) in that it reflects a person's real opportunities or positive freedom of choice between possible life-styles. This immediately opens up two distinct and important spaces for thinking about wellbeing.

While income and commodities undoubtedly contribute to wellbeing, there is no obvious or straightforward link between material things and the ability to function for various reasons. Notably people typically differ in their capacity to convert a given bundle of commodities into valuable functionings (*ceteris paribus,* a rickshaw cyclist requires a higher intake of calories than those he pulls who have a more sedentary lifestyle). Similarly, the other pole of welfare or utility ultimately reduces wellbeing to mental states such as pleasure or proxies for mental states, namely desire fulfilment or the fact of choice. Other valuable achievements, particularly in the physical, social or political sphere of life (such as avoiding malnutrition, being able to move around, achieving self respect, having civil liberties, etc) only matter insofar as they influence utility levels. The crucial problem here is that utility 'can be easily swayed by mental conditioning or adaptive expectations' (Sen 1999: 62) . The ability of people to adapt to harsh environments and unforgiving situations means that expressed satisfactions may be a poor guide to

objective life situations. Sen (1984) cites evidence from a post famine health survey in India, which suggests significant disparities between the externally observed health of destitute widows and their own subjective impressions of their physical state, in comparison with the levels of wellbeing reported by widowers in the same situation. Widowers experienced less morbidity than widows yet reported lower subjective wellbeing. If our concern is with anything other than subjective wellbeing, we are pushed in the direction of capabilities or functionings.

However, Alkire (2007) illustrates it is no easy task to operationalise, measure and track capabilities. The capability-set of a person includes 'not only the opportunities that people had actually chosen … but also the counterfactual opportunities that that had been open to them that they had not chosen'. Alkire surveys and suggests some ways to capture this elusive notion, but in the 1980s it seemed beyond reach.[4] Thus the main focus narrowed down to a person's chosen functionings, or what a person succeeds in doing with the commodities and commodity characteristics at her disposal, given her personal characteristics and environment. But this too is an extremely broad notion. Valuable functionings may include the ability to play the saxophone, to act generously towards friends or to feel good about oneself. There is no self-evident way to evaluate these and compare them across persons or groups of people. The capabilities approach lacks 'a methodological side-car', writes Alkire (2007).

Agreement is more likely on a list of *basic* functionings. However, though Sen has always recognised in practice and in a series of famous works on famine, for example, that common and egregious threats to wellbeing do exist, he has repeatedly refused to endorse a list of such threats. His work underpins the well-known Human Development Index, which prioritises longevity, literacy and schooling, alongside (the logarithm of) per capita GDP. Nevertheless, agreement on common human needs beyond this minimum will remain elusive in the absence of a theoretically informed conception and 'list' of basic needs.

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[4] Arneson (1989: 28) wrote: 'I doubt that the full set of my functioning capability [matters] for the assessment of my position. Whether or not my capabilities include the capability to trek to the South Pole, eat a meal at the most expensive restaurant in Omsk … matters not one bit to me, because I neither have, nor have the slightest reason to anticipate I ever will have, any desire to do any of these and myriad other things'. Quoted in Ruta et al In Press.

Martha Nussbaum has developed such an alternative - a 'thick' notion of human capabilities which both parallels and differs from Sen (Nussbaum 2000). She extols a broad vision of human flourishing and is prepared to identify a lengthy cross-cultural list of human 'functional capabilities': life, bodily health, bodily integrity, sense/ imagination/ thought, emotions, practical reason, affiliation, concern for other species, play, and control over environment. Initially derived from an Aristotelian framework, it is 'informed by an intuitive idea of a life that is worthy of the dignity of the human being' (Nussbaum 2006: 70). In recent years, she has presented these capabilities as the source of political principles for a liberal, pluralistic society; she also asserts that they form the content of 'an overlapping consensus among people who otherwise have very different comprehensive conceptions of the good' (2006: 70).[5] Reflecting her disciplinary backgrounds in philosophy, law and ethics, Nussbaum advances a richer picture of human life than Sen, yet is willing to countenance that there are universal capabilities applicable to all peoples everywhere. However, the foundations of her approach are arguably controversial and its potential for securing cross-cultural consensus is thus far unproven (Clark 2002, Menon 2002).

In the past two decades there have been many attempts to develop theorisations and lists of basic needs, functionings, and related concepts. Alkire (2002a) summarises thirty-nine of these and analyses nine in detail. However, these are very diverse lists embracing very different things. In the WeD research framework we have drawn explicitly on Doyal and Gough's *Theory of Human Need* (1991 - THN), which seeks to provide a 'fully universalisable' conception of needs/ capabilities, an explicit critique of cultural relativism, and a moral grounding for strong right-claims to their satisfaction (Gough 2003). THN identifies a conceptual space of universal human need; recognises cultural variety in meeting needs; but aims to avoid subordinating the identification of needs to such cultural contexts. The argument is explicitly 'hierarchical'[6] and moves in the following stages

[5] But her earlier emphasis on reflexivity and awareness of others as the core of human nature means that she continues to regard practical reason and affiliation as 'architectonic capabilities', as the 'core of the core' (Gasper 2004: 183).

[6] However it must be stressed that this has nothing in common with Maslow's (1954) hierarchical theory of needs as motivations. As THN argues (1991, ch.3) and as Gasper (2007) demonstrates, there is no necessary correspondence between drives and motivations and 'normative priority goals'.

(Doyal and Gough 1991, Alkire 2007; Bebbington *et al* 2007; Gasper 1996; Gough 2003, 2004).

First, THN distinguishes between two types of goals: *needs*, which are believed to be universalisable or potentially applicable to all people, and *wants*, which are not necessarily so and indeed will tend to reflect particular cultural environments. The universality of need rests upon the belief that if needs are not satisfied then serious *harm* of some objective kind will result. THN defines serious harm as fundamental disablement in the pursuit of one's vision of the good, whatever the nature of that vision[7]. This is not necessarily the same as subjective feelings like anxiety or unhappiness. Another way of describing such harm is as an impediment to successful social participation. THN argues that we build a self-conception of our own capabilities through interacting with and learning from others. It follows that participation in some form of life without serious arbitrary limitations is a fundamental goal of all peoples.

Second, *basic needs* are then defined as those universal preconditions that enable such participation in one's form of life. These are identified as *physical health* and *autonomy*. Survival, and beyond that a modicum of physical health, is essential to be able to act and participate. Humans also exhibit autonomy of agency – the capacity to make informed choices about what should be done and how to go about doing it. This is impaired, they argue, by three things: severe mental illness, poor cognitive skills, and by blocked opportunities to engage in social participation. At a higher level, they identify critical participation – the capacity to situate the form of life one grows up in, to criticise it and, if necessary, to act to change it. This more dynamic type of participation requires a second-order level of *critical autonomy*. Without critical autonomy, the ability of human societies to adapt to changes in their environment would be gravely weakened. It is an essential pre-requisite for innovation and creative adaptation, especially in times of transformation and upheaval.

Third, accepting that these common human needs can be met in a multitude of different ways by an almost infinite variety of specific 'satisfiers', THN goes on to identify those characteristics of need satisfiers that everywhere contribute to improved physical health and autonomy. These 'universal

[7] McGregor (2007) qualifies this when discussing the relation between the individual and social order, and recognises that we must debate whether all visions of the good can be regarded as equally socially acceptable.

satisfier characteristics', or *intermediate needs* for short, are grouped into eleven categories: adequate nutritional food and water, adequate protective housing, non-hazardous work and physical environments, appropriate health care, security in childhood, significant primary relationships, physical and economic security, safe birth control and childbearing, and appropriate basic and cross-cultural education.[8] All eleven are essential to protect the health and autonomy of people and thus to enable them to participate to the maximum extent in their social form of life. These intermediate needs are based on the codified knowledge of the natural and social sciences. This knowledge changes and typically expands – today often at dizzying speeds – through time.[9] Thus the concept of human need is historically open to such continual improvements in understanding.

However, fourth, a quite distinct method is required to identify specific *need satisfiers* in particular contexts. Across the world and throughout history, cultural repertoires of beliefs and practices have been developed by communities in relationship to the particular natural and social environments they inhabit. These generate meanings for people within that community and provide durable solutions to the recurrent problems that those individuals and collectivities face. These default solutions provide and justify the numerous concrete need satisfiers which enable people to meet their needs. However, cultural identities are multiple and 'solutions' are contested, notably in mobile and migrant populations within the peripheral zones of capitalism (Altamirano et al 2004). To adapt need satisfiers to a rapidly changing environment, THN argues, a 'dual strategy' is required. Any rational and effective attempt to resolve disputes over needs and improve practices to meet needs 'must bring to bear both the codified knowledge of experts and the experiential knowledge of those whose basic needs and daily life world are under consideration. This requires a *dual strategy of social policy formation* which values compromise, provided that it

[8] This list, like all taxonomies, is in one sense arbitrary (Doyal and Gough 1991: 159). The groups are 'verbal wrappings' or 'labels' designed to demarcate one collection of characteristics from another. Moreover, the word-labels used will be ambiguous - they will 'not contain or exhaust the meaning of the need identified'. Ambiguity can be reduced by increasing the numbers of characteristics or 'need categories'. Yet the larger the set, the greater the problems in comprehending the totality of human needs.

[9] Doyal and Gough are comfortable to acknowledge that humans as a species have made and continue to make progress in their capacity to understand and satisfy their needs (THN:111).

does not extend to the general character of basic human needs and rights' (Doyal and Gough 1991:141). The universal can guide but never dictate the local vision of what must be done to achieve wellbeing in specific contexts.

Yet, fifth and last, THN recognises certain common dilemmas in all collectivities which set bounds on their variation. Four societal preconditions - production, reproduction, cultural transmission and political authority – must be satisfied by all social forms of life if they are to survive and flourish over long periods of time (THN 80-90). The hypothesis is advanced that 'the degree to which individual needs are capable of being satisfied in principle will depend in practice on the degree of such societal success'. Similarly, 'the success of social forms of life will in turn be predicated on the health and autonomy of its members' (THN: 89). Yet, though individual needs can never be *satisfied* independently of the social environment, and though need satisfiers are context-specific, THN insists that basic needs must be *conceptualised* independently of any specific social environment.

Much other rich thinking about human need is explored by the contributors in Section 1 of Gough and McGregor (2007) which modifies THN in various ways, for example the dividing line that it draws between the objective, externally-observable and the subjective. Though THN recognises the constraints placed on a person's autonomy by severe mental illness, recent research points to the further importance of subjective attributes such as self-confidence, dignity and absence of shame in the exercise of autonomy. In recent years the work of Richard Ryan and Edward Deci and their collaborators within psychology has done much to augment and give content to these ideas on autonomy and practical reason (e.g. Brown and Ryan 2003; Ryan and Deci 2001). Building on previous work on the relationship between types of motivation, pursuit of goals, and psychological wellbeing, they develop an alternative philosophy and psychology of wellbeing, 'eudaimonism', which considers wellbeing as fulfilling or realizing one's *daimon* or true nature through the actualization of human potentials (Ryan and Deci 2001: 143)[10]. They demonstrate the centrality of autonomy alongside competence and relatedness as a universal psychological need, interpreting autonomy as the experience of willingly originating and endorsing one's actions. However they recognise that this forms a continuum, ranging from actions undertaken purely to obtain a reward or

[10] Eudaimonic wellbeing represents an alternative to both psychology's traditional focus on clinical pathology, and subjective wellbeing or 'hedonic psychology' (Diener 1984, Kahneman et al 1999).

escape punishment or to avoid feelings of guilt, to more positive endorsement of one's action (Chirkov et al 2003; Ryan and Deci 2000b). This illustrates how one strand of psychological theory and research enriches the approaches to human need and objective wellbeing outlined above.

The work of Sen, ul Haq, Nussbaum, Doyal and Gough, Ryan and Deci and others lend support to common criteria and indeed some common measures of objective wellbeing. They underpin at various removes most of the Millennium Development Goals and more ambitious indicators of empowerment and autonomy. There is now a solid conceptual and empirical foundation for a notion of objective wellbeing, which does not necessarily correspond with individual subjective perceptions, or aggregate measures of income and control over commodities. Different perspectives within this approach are elaborated and explored in Section 1 of Gough and McGregor (2007).

3. RESOURCES, LIVELIHOODS AND WELLBEING

During the 1980s and 1990s there were a number of notable advances in research frameworks and methodologies for understanding the actual lives that people in developing countries live. The term 'actual lives' refers to the desire to research people's actual choices and actions in relation to possible opportunities (see Alkire 2007); it also signals a departure from discussions of poor people that abstract them almost completely out of the picture. A substantial body of work in development studies has moved from narrowly conceived income 'poverty' analyses; to understanding how 'livelihoods' are constructed; and then on to still wider notions of 'resource strategies', which seek to take better account of the social and cultural structures within which these are located. These approaches can make a useful contribution to the emerging discussion on a concept of wellbeing.

One thing that is striking when one spends any amount of time with men, women and children who are living day to day in poverty is their resourcefulness. Where many of us from much more privileged backgrounds would be defeated by such hardship, and find it difficult to see ways of living in these conditions, those who do display remarkable resilience and innovation, and through hard work, survive. This is not romanticism or an attempt to idealise poverty and the poor - it is an

observable fact. As the currently popular statistics tell us, millions of people around the world live on less than one dollar-a-day and are apparently without obvious means of meeting their daily needs of food and shelter. While many succumb, especially children, most survive. The puzzle for those involved in research and practice at the frontline of development has been to understand how they do this.

Amartya Sen's development of an entitlement approach to understanding famines in the early 1980s provided one important stimulus for new thinking in this area of study. While there were important predecessor studies in economic and social anthropology and in the development administration literature, the entitlement approach provided a well-organised way of thinking through the detail of the dynamics of famines and why some people die while others do not. The difference, argued Sen, was explained by people's ability to translate – or not - endowments into entitlements in respect of food. Thus, according to Sen's analysis in the Ethiopian famine of 1973, pastoralists were particularly badly affected not only by their animals dying from a lack of food and water but the interplay of this with a relative decline in the market value of their livestock in respect of other foodstuffs. In the Bengal famine of 1943, fishing households were particularly affected as the value of their entitlements declined in relation to the price of grain and rice. The notion of entitlement encompassed what people were able to produce, what they were able to exchange and what they were able to claim in other ways. This type of approach shifted analysis beyond a narrow focus on income and the material resources people owned, towards the investigation of how they secured access to what they need. In doing so it extended our imagination about the types of resources that might be deployed and the strategies that might be adopted to realise entitlements.

This analysis fitted well with another tradition of study of agricultural systems focusing on the vulnerability of the poor, notably Robert Chambers' *'Rural Development: Putting the Last First'* (1983). Its idea of 'poverty ratchets' (the progressive loss of entitlements over time) highlighted both the notion of vulnerability and the dynamics of poverty. *Vulnerability* was a concept that particularly drew on studies of food insecurity, but Chambers' analysis took account not just of seasonal or natural disasters but also of social and political dimensions of the poverty processes. It argued the need to take account of the role of indigenous knowledge - the understanding that poor people themselves have of their poverty and vulnerability. In his work on pastoralist communities in Sub-Saharan Africa, Jeremy Swift (1989)

elaborated an entitlement approach by focussing on the strategies that households employed to manage different types of assets and claims in the face of vulnerability and food insecurity. This was complemented by further work seeking to explain morbidity in famines by De Waal (1989).

These contributions stimulated a number of parallel researches into the ways in which people in developing countries secured their livelihoods. Bebbington *et al*
(2007) reviews a distinction between two strands of the 'livelihoods frameworks': between those that emphasise 'what people *think and do'*, and 'what they *have and control'.* While both stress the agency and coping ability of poor people, each develops a different discourse and arguably take different ontological paths with consequently different connections to wellbeing.[11]

The 'having and controlling' form of livelihoods framework focuses on notions of 'capitals and assets'. From a food security perspective and with strong roots in natural resources research traditions, authors such as Longhurst, Conway, Scoones and others established the basis for what has become known as the Sustainable Rural Livelihoods framework. Working closely with the Natural Resources Division of the UK Department for International Development this found its fullest elaboration in a 1998 publication by Carney. This sets out the model of five categories of 'capital assets': natural, human, financial, physical and social. Caroline Moser, working with the World Bank, developed her Asset Vulnerability Framework particularly to bring this type of analysis to bear on urban populations and also incorporated some of her prior gender concerns (Moser 1998). The assets identified by that framework were: labour, human capital, housing and infrastructure, household relations, and social capital.

There were strong synergies here with the emerging work of Robert Putnam (1993) on social capital. The equation of social capital with economic success and societal progress supported and legitimated the language of

[11] Aside from these two paths of intellectual development, a third route from the essay on entitlement led to further engagement with development ethics and philosophy and to debating the 'capabilities and functionings' concepts subsequently advanced by Sen. These have been discussed in the preceding section, but much of this discussion has a tendency to become detached from the empirical study of development and has had more to do with debating lists and levels of abstraction rather than the actual lives of poor people.

capitals and was exactly the kind of meta-development story which development agencies could work with. It fitted well with grander discourses of governance and complemented the thin agenda on markets and competition by attending to the social domain. At a more operational level, the 'capitals and assets' approaches gave development agencies a simple framework for identifying and formulating more strategic and sophisticated poverty-focused interventions (Rakodi 1999). These could include supplementing the 'capital' holdings of individuals and households as well as building social capital and 'civil society' as a form of support for the poor.

The second, 'thinking and doing' livelihoods framework has been more sociological or anthropological in its orientation and purpose. Here the work of Norman Long on the development 'interface'[12] during the early 1990s was important (Long and Long 1992), as was the influence of authors such as James C. Scott on the moral economy (1985), and Pierre Bourdieu on symbolic capital (1977). A specific form of this type of livelihoods approach, as introduced in section 1.1, was developed by a group working at the University of Bath and was labelled the Resource Profiles Approach or Framework (see Lewis et al 1991, Lewis and McGregor 1992, Saltmarshe 2002). An important and ontologically significant difference between the RPF and 'capitals/assets' thinking is that the value of resources in pursuit of goals or objectives is contingent on the goals and also on the context and the circumstances within which the livelihood and broader wellbeing outcomes are being negotiated (see White and Ellison 2007). Beginning with the study of means rather than ends, the RPF approach implicitly accommodated the longstanding recognition within the basic needs and capabilities approaches that something like good health is simultaneously both.

The RPF emerged from a number of empirical, ethnographic studies in rural Bangladesh conducted during the 1980s. Bangladesh, despite being so uniformly flat and wet, exhibits considerable regional variation, and within localities there is a bewildering array of endeavours and experiences among rural people as they pursue their 'livelihood'. One of the challenges confronting village level studies in Bangladesh has been to escape from the 'naturalist' or 'neo-Malthusian' view that poverty is primarily due to scarcity of 'resources' in relation to the large number of people. Rather, these village

[12] The point of interaction and encounter between the client and bureaucrat in development interventions.

studies recognised that the competition for scarce resources was a profoundly social phenomenon.[13] As Stephen Gudeman put it, in reference to the study of rural life in a different continent, 'the process of gaining a livelihood is culturally constructed in diverse ways' (1986:28).

The RPF conceives of individuals and households constructing livelihoods using a range of social and cultural resources alongside the familiar material, human and environmental resources. *Social* resources are those relationships people invest in to try to secure entitlements; *cultural* resources refer to symbols of status or markers of identity that can be deployed in negotiations over the value of endowments. This approach draws on a wide-ranging set of debates in economic anthropology, but the work of Laurence Rosen is particularly relevant. Following the work of Geertz (1973, 1979, 1983), Rosen's study of market behaviour in Morocco explores the ways in which individual identity is negotiated in transactions in the bazaar, using a range of cultural symbols and referents, and then how this identity is significant for the treatment one receives in the bazaar (Rosen 1984). This idea resonated in the study of rural Bangladesh, where notions of malleable identity abound and where the treatment of individuals in the market or in relation to the state is highly dependent on the identity one is able to establish. The notion of Muslim caste vividly illustrates the interplay between material and cultural resources in the Bengali context (Arefeen 1982; van Schendel 1981). As a common Bangla proverb puts it: 'last year I was a Johola, this year I am a Shekh; and next year if prices rise I will be a Said.'[14]

The proverb captures the notion that the acquisition of material resources permits the renegotiation of cultural and religious identity, which in turn can result in material benefits. From this perspective, the social and cultural dimensions of societal structures play a significant role in enabling or

[13] Generally see Sahlins 1974, and for Bangladesh see Chowdury 1978 and Jahangir 1982. Erik Jansen's adoption of a Barthian framework in his 1986 publication 'Rural Bangladesh: Competition for Scarce Resources' is a good example of this, and similar ideas were embodied in Willem van Schendel's notion of 'self-rescue' (Van Schendel, W. 1986 'Self-Rescue and Survival: The Rural Poor in Bangladesh' paper to ASA Australia Conference (mimeo)).

[14] The name or title of Johola refers to a low Muslim caste associated with weaving, while the names Shekh and Said denote middling and then higher caste labels, with implicit claims to traceable lineages to the middle-east, redolent with elite and religious status. See Jack (1927).

constraining different individuals and households in their struggles for 'livelihoods'. It is this engagement with culture and its inclusion as one category of resource with which 'livelihoods' and (if we extend that notion) wellbeing is pursued that marks the RPF as a framework distinct from the 'capitals/assets' model. The RPF is built on the anthropological tradition of assuming that what people do has meaning for them and that it reflects what they value, both in terms of outcomes they are striving for and the processes they engage in to try to achieve those outcomes. It recognises that people may not always succeed in achieving their objectives, and that they may be dissatisfied with both outcomes and processes, but in general they are not defeated and continue to have aspirations which they strive to meet[15].

The RPF also posits that as people engage in these processes they are participating in the reproduction of structures within their society. The term structure here encompasses the values that are embedded in the processes they engage in, as well as the institutions and organisations which are, on the face of it, accorded relevance and legitimacy by repeated engagement with them. The institution of dowry provides a controversial example here. Although understood by many as a major cause of destitution and gendered disadvantage for poor families with daughters as well as a mechanism for the entrapment for young women, its persistence in South Asia reflects a view that it remains an accepted institution for social and moral bonding in communities across the sub-continent (see Khan and Seeley 2005).

Tony Beck's impressive empirical study of life in rural West Bengal (1994) is another path breaking example of the 'thinking and doing' approach to livelihoods, when he explores the struggles of poor people not just for resources, but also for respect. A series of articles by McGregor on credit and debt in rural Bangladesh also employ this perspective to understand the evolution of policy debates and the emergence of microfinance NGOs in that country (1989a, 1989b, 1994, 1998[16]). The work of Bebbington (1999), Zimmerer (1996) and Zoomers (1999) on the importance of identity in

[15] The term 'defeated' is used here intimating the sense of 'homeostatic defeat' as proposed by the psychologist Robert Cummins (2002) and discussed later. This involves not just physical but also psychological collapse. See below for further discussion, and Camfield and McGregor 2005.

[16] McGregor, J.A. (1998) *A Poverty of Agency: resource management amongst the poor in Bangladesh*, paper presented at the Fifth Workshop of the European Network of Bangladesh Studies, 18-20 April.

livelihoods in the Andes represents another tradition in development studies which emphasises the significance of struggles for identity.

Livelihoods frameworks have attracted their fair share of criticism, but most have not distinguished between these two variants. One criticism contends that livelihoods frameworks have been crudely instrumentalist, concerned primarily with means rather than ends. However, this is less the case for the 'thinking and doing' strand, which is built on recognition of the importance of understanding the relationship between means and ends. It highlights some of the sterility of the means/end discussion, recognising that resources, especially when understood as more than just material, can be and are most often both means and ends. This point is emphasised by Alkire (2007) and is set out by Sen in relation to the notion of freedom. In integrating the RPF with the Theory of Human Need, the WeD research recognises that resources are inextricably bound up with needs and in some cases can be understood as the flip-side of them. The satisfaction of needs constitutes the resources with which individuals and households pursue their next round of ends. Satisfying needs for food one day ensures that the human resource, the body, is better prepared for work the following day. Further, the needs that people aspire to satisfy can often be taken as indication of the resources, or means, that they perceive they require to live a good life in their particular community and context.

A different criticism that potentially applies to both types of livelihood framework is that they overemphasise the agency of the poor and so obscure the role of structure in constraining the poor. This impression reflects broader shifts in the sociology of development. In the early 1990s the sociology of development gave itself a tentative pat on the back for emerging from its theoretical 'impasse' of the 1970s and 1980s - a preoccupation with structuralist explanations of social processes (Booth 1994:298). The new approaches, advanced by European sociologists and anthropologists, re-asserted the importance of individual agency in the face of social structure. The work of Norman Long and the 'Wageningen School's' actor-oriented approach particularly illustrates this approach. This drew on a range of other influences, not least the work of Bernard Schaffer (1974) on 'access' and James C. Scott's work on Moral Economy (1985). Long's (1989) interface approach explored negotiations between clients and bureaucrats in development interventions, in order to provide an ethnographic explanation of the differential outcomes observed. The emphasis on negotiation was crucial in as much as outcomes are not seen

as predetermined, but as the result of complex interactions affected (but not entirely determined by) wider structures.

However, there is fine line between an ‘actor-oriented’ approach painting a rosy picture of the peasant with power and agency (albeit subordinate), and underestimating the significance of the societal structures within which they live. Brass (1996) provides a stinging critique of what he regards as the common failure of the new approaches to explain the resilient patterning of relationships between rich and poor. James C. Scott’s various publications using a moral economy approach illustrate this problem well (e.g. *Weapons of the Weak: Everyday Forms of Peasant Resistance* 1985, 1990). His avoidance of concepts of class or an overt examination of the role of the distribution of wealth and power in society, obscures the ways that structure systematically constrains not only the social room for manoeuvre of the poor, but also their ability to conceive of realistic alternatives. Or, to put it another way, the way that structure contributes to the reproduction of their poverty of agency (McGregor 1998).

A final criticism that can be levelled particularly at the ‘capital/assets’ type of livelihood approach is that they threaten to mystify differences between households. This problem is inherent in an uncritical acceptance of the notion of ‘capitals’ and the relatively simplistic view of what people *have* as the main explanation of their poverty. As we have argued and as Sen has pointed out, it is not just about what people have but what their goals and aspirations are; what they are trying to do with what they have, and about what choices they make in trying to achieve these goals. Moreover, in adopting the language of ‘capitals’, these frameworks tend to reify social constructions whose meaning and reality is constantly being negotiated.

The term social capital is particularly misleading in that it suggests that relationships are 'owned' and ever-present. Rather, the relationships in which people invest must be understood as claims on reciprocity appealed to when they are needed. Some of these appeals to relationships may be strengthened and made more predictable by contract and law, or by broader notions of 'rights', but in many cases the appeals are more circumstantial. This underpins our understanding of the vulnerability of poor people in developing countries (McGregor 1991[17]; Wood 2003). By concentrating on

[17] McGregor, J. A. (1991*) Poverty and patronage: a study of credit, development and change in rural Bangladesh*, PhD thesis submitted to the University of Bath.

the ‘having’ and ignoring the less tangible resources which individuals and households deploy, the ‘capitals/assets’ approach fails to distinguish between those who can benefit from ‘social capital’ and those who cannot, let alone those who may be clearly harmed by it (Putzel 1997). They thus obscure not only the diversity of strategies that different households adopt in their pursuit of livelihoods and wellbeing, but reduce insight into the processes that reproduce their poverty. It is this level of detail and attention to process which tends to be missing from the new generation of official development procedures and documents, such as Poverty Reduction Strategy Papers (PRSPs); as such they are likely to fail to sustainably reduce poverty (Booth 2005)

The emphasis on the role of social and cultural resources in the Resource Profiles Framework distinguishes it from the ‘capital/assets’ type of approach to the analysis of livelihoods and poverty. Both the World Bank 'Asset Vulnerability Framework' and the British Department for International Development (DfID) supported 'Livelihoods' approach conflate the social and cultural into a category of 'social capital'. In doing so both hide the significance of the role of culture, values and norms in constructing and legitimating the identities necessary for the pursuit of livelihoods and wellbeing. The RPF differentiates better between different individuals and households in different contexts. It also challenges development practice to engage with issues with which it has historically been uncomfortable: peoples’ values, goals and cultures. From the RPF perspective, the persistence of poverty has as much to do with the reproduction of meaning in societies, as it has to do with what people have and do not have. As we argue later, this suggests that we should separate the terms ‘doing’ and ‘being’ which Sen has brought together in his definition of functioning. It is systems of meaning, negotiated through relationships within society that shape what different people can and cannot do with what they have. And, by giving sense to a person’s doing, meaning translates the ‘having’ and ‘doing’ into ‘being’.

4. SUBJECTIVE QUALITY OF LIFE: HAPPINESS AND SATISFACTION WITH LIFE AS A WHOLE

The third component in the conceptual movement from poverty to wellbeing in development thinking goes by various labels including quality of life, subjective wellbeing, life satisfaction, happiness. All bring subjective feelings

and evaluations centre-stage and propose to conceive and measure these directly rather than via other proxies. Different disciplines and perspectives have contributed to this stream of research, but three have been of special importance and are surveyed here: subjective quality of life research by health psychologists and clinicians (see Schmidt and Bullinger 2007), the psychology of affect balance and life satisfaction, and the economics of happiness[18]. Although these streams mainly originated in rich countries and reflect their concerns, they are expanding into the majority world[19]. Their relevance to understanding poverty and wellbeing has only recently been appreciated within development studies, but they have a clear antecedent in the concern with 'participation' and participatory research, with which we begin.

The participatory perspective in development coalesced in the late 1980s and 1990s at the confluence of several distinct streams. At one extreme, Rapid Rural Appraisal (RRA) was devised for development consultants seeking quicker and more cost-effective techniques to assess people's material conditions and social networks in the field. At the other, participatory research was developed as a means to empower disadvantaged people by giving them tools of analysis and awareness, for example, by community organisers influenced by Paolo Freire's ideas of conscientisation (Bennet and Roberts 2004; Freire 1970). Criticism of the quality of preparatory research and planning from both academics and the supposed 'beneficiaries' (for example, members of the African liberation movements whose slogan was 'nothing about us, without us'), combined with the sheer weight of experience, supported the perspective that people living within a situation had a better understanding of the many issues facing

[18] This omits the earlier 'social indicators' movement, which brought together researchers from sociology and social policy, psychology and economics in the third quarter of the last century. Andrews and Withey (1976) and Campbell, Converse and Rodgers (1976) can be seen as founding fathers of this approach, which typically defines and measures quality of life as a combination of subjective and objective dimensions, and is therefore less useful for our purposes. It has however fostered the construction of subjective datasets from the seventies onwards (e.g. Easterlin 2003).

[19] For example, the World Health Organisation's sponsorship of cross-cultural quality of life measures (WHOQOL Group 1995), the extension of the EuroBarometer surveys of social and political attitudes to Africa, Latin America, and East Asia, and the work of happiness economists reviewed in Guillen-Royo & Velazco 2006.

them than outside experts 'bussed in' for a few days or weeks (Chambers 1992).

Out of this emerged the Participatory Rural Appraisal (PRA) approaches developed by Robert Chambers and others in the late 1980s and early 1990s. The ambitious World Bank's 'Consultations with the Poor' study perhaps represents its apogee[20], although the quality of different components of the project was variable, and it has stimulated much critical reflection among practitioners (e.g. Cooke and Kothari 2001; Cornwall and Pratt 2003). The key promise of participatory methodologies is that they are 'experience-near' in terms of their participant/respondents: they are able to reflect more closely the knowledge and worldview of people themselves than more formal, abstract, or 'scientific' approaches.

The desire to create both a space for people to reflect on and share their experiences, and conduct research that generates valuable outcomes for participants, policy makers, and practitioners, is what, we contend, links participatory and 'quality of life' research (White and Pettit 2004). Examples of mutually beneficial engagements are the use of participatory methodologies by individualised quality of life measures such as the *Person Generated Index*[21], and the combination of participatory research and measurement in the *Participatory Numbers Network* (Holland and Abeyasekera, forthcoming). However, most quality of life research has been undertaken in rich Western countries and reflects their concerns. We begin our survey of this literature with research by health psychologists and clinicians.

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[20] The study was published in three volumes: volume 1, *Can Anyone Hear Us?*, synthesising 81 Participatory Poverty Assessments conducted by the World Bank in fifty countries (Narayan,D); volume 2, *Crying Out for Change*, drawing on participatory field work conducted in 1999 in twenty-three countries (Narayan, D., Chambers, R., Shah, M.K. and Petsch, P. 2000); and volume 3, *From Many Lands*, offering regional patterns and country case-studies (Narayan, D. and Petsch, P. (Eds.) 2002). It was supplemented by Brock's review of participatory research on criteria for poverty, illbeing, or vulnerability, which took place outside the PPA framework and was consequently considered to be more challenging (1999).

[21] Ruta 1998; for an example of its adaptation and use in rural Ethiopia, see Bevan, P., Kebede, B. and Pankhurst, A. (2003) *A report on a very informal pilot of the Person Generated Index of Quality of Life in Ethiopia*, unpublished work, WeD, University of Bath.

Research into *health-related quality of life* was developed in the mid 1970s by health scientists and psychologists to track people's perception of their health status (for example, the Sickness Impact Profile, Bergner et al 1976). This was mainly in response to the need for more sensitive measures to compare treatments for chronic illness and to identify the most cost-effective. Health-related QoL has measured people's perceptions of their health status through both subjective questions about satisfaction and emotions (Nord et al 2001), and 'self-report' objective questions about symptoms and functional status.[22] The use of measures outside their countries of origin (for example, the SF-36, which has now been used in over sixty countries (Ware and Sherbourne 1992) prompted cross-national comparative research, and the establishment of international bodies to 'quality control' the translation and validation process (see Schmidt and Bullinger 2007). This process was accelerated by their increasing use in international clinical trials (Spilker 1990, 1996). As the net of countries widened, a range of new issues and problems became apparent. For example, while people in different cultures experience common diseases, they may attach different meanings to them, or indeed not recognise some prevalent conditions as diseases at all. For many anthropologists this rules out cross-cultural studies of people's health status or health-related quality of life across cultures. But some applied anthropologists and medical sociologists have attempted to use quality of life research to bridge the gap between universal medical classifications of diseases and the representation of culturally variant meanings and experiences (for example, Guarnaccia 1995; Lambert and McKevitt 2002).

Perhaps the most successful and influential cross-national research programme has been the World Health Organisation Quality of Life Group (WHOQOL), established in 1991, which formed one of the initial planks of the WeD research. It defines quality of life as 'an individual's perceptions of their position in life in the context of the culture and value systems in which they live, and in relation to their goals, expectations, standards and concerns' (WHOQOL Group 1995). WHOQOL developed a common

[22] While Nord maintains that 'the term ''quality of life data" should be used … only in connection with data about people's subjective feelings about life' (p.3, ibid), he acknowledges that the majority of health-related quality of life measures combine both forms of data. This is also true of the way 'general' quality of life is operationalised, despite a historical disconnect between the two areas (Michalos 2004, Cummins et al 2004), represented by their two membership organizations ISQOLS and ISOQOL.

international protocol to construct generic QoL profile measures. For example, all fifteen of the original WHOQOL centres contributed to the definition of the facets that comprised the six domains of Quality of Life[23]. Questions were drafted by population focus groups, which generated ideas within each centre as to the best way to ask locally appropriate questions about people's quality of life. The programme has shown that although country populations show different levels of QoL across domains, the overall structure has a high cross-cultural validity for all domains, suggesting a high degree of universality (Skevington et al 2004). However, it faces several problems: the WHOQOL is about health-related quality of life and does not directly address the issue of autonomy; moreover, although many of the original field centres were in developing countries or transition economies, arguably the agenda had already been set by the 'expert review' which established the six domain structure and there was little modification to this after item development and piloting.

The second stream of research into subjective wellbeing (SWB) has been conducted exclusively within the discipline of psychology. Psychologists have long been interested in life satisfaction and happiness (e.g. Bradburn 1969; Cantril 1965, Maslow 1970); however, the topic only entered mainstream psychology in the mid 1980s. This was facilitated by the development of valid measures of these concepts such as the Satisfaction With Life Scale (Diener et al 1985), which has been used in over sixty-one nations (e.g. Suh et al 1998). In 1999 Daniel Kahneman and his colleagues published *Well-Being: The Foundations of Hedonic Psychology*, '… to announce the existence of a new field of psychology... Hedonic psychology … is the study of what makes experiences and life pleasant or unpleasant' (Kahneman et al 1999: ix). This synthesises over a decade of work and demonstrates that 'positive affect and negative affect' can be operationalised and measured, albeit they are orthogonal and not opposite ends of a single continuum as was previously supposed.

Hedonic psychology also incorporates research on life satisfaction, associated with the work of Ed Diener and others. This typically asks people to rate their satisfaction with their 'life as a whole', and claims that this data converges well with other types of measures, such as the views of friends and anthropogenic markers such as extent of smiling. Compared with

[23] Physical, Psychological, Social, Environmental, Economic, and Spiritual (the last two domains are not included in the more commonly used WHOQOL-BREF).

momentary balance of affect, this entails a cognitive and evaluative element, however brief. More typically subjective wellbeing is ascertained by combining measures of affect balance with life satisfaction, following Diener's earlier work (Diener 1984; Diener and Griffin 1984). In addition, there is flourishing research into domain-specific satisfactions, such as satisfaction with one's work, family, housing etc, as investigated by Rojas (2007). The variety of different measures raises the interesting philosophical question of which form of happiness is the 'real' one[24] (Diener et al 2000), which links to the debate over 'top-down' and 'bottom-up' theories of happiness, recently extended to developing countries[25].

This research has generated a mass of solid findings on the determinants of SWB. They include personality factors, such as extraversion versus neuroticism (Deneve 1999; Vitterso and Nilsen 2002), good quality relationships (Myers 1999), and working towards goals and achieving them (Emmons 1996; Oishi 2000). The relationship between income and wealth and SWB is non-linear across income groups and countries: greater income improves wellbeing among the poor, but above a certain point where basic needs are met it yields drastically diminishing returns[26]. On the other hand, low income and few material goods in comparison with others within your society is usually a negative predictor of wellbeing (Eggers, Gaddy, and Graham 2004; Frank 2004). So too is materialism, the pursuit of money for its own sake (Kasser 2002).

There is growing evidence also on the reverse effect of SWB on life achievements and objective conditions. A person's subjective happiness and life satisfaction impacts strongly and positively on success in the major

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[24] This will in part depend on what the researcher wants to achieve by assessing someone's subjective wellbeing; while domain specific or even objective assessments would give the most accurate evaluation of the person's current state, if the researcher wanted to know the person's basis for decision making or planning (e.g. 'shall I join this new credit and savings group?'), they might be better off using the global assessment.

[25] See Headey et al 1991, Moller and Saris 2001, Saris and Andreenkova 2001, Moller forthcoming, and Bullinger and Schmidt forthcoming.

[26] Richard Layard sets the current threshold at $20,000, using data from the World Values Survey (Layard 2005). There are outliers: negative ones in the Former Soviet Union and Eastern Europe, and positive ones predominantly in Latin America. For example, Worcester's analysis of the 1995 World Values Survey data placed Venezuela tenth and the Philippines twelfth for happiness, despite per capita GDP of $8,090 and $2,762 respectively, and HDI scores of 0.86 and 0.67 (1998).

domains of life, notably love, work and health. For example, Lyubomirsky et al (2005) find that happiness is associated with an extra seven years of life expectancy, *ceteris paribus*. Thus in addition to its intrinsic, experiential value, SWB plausibly contributes to human development. This includes the 'worthwhile ends' of happiness, enjoyment, rest and relaxation (Clark 2002), and the acquisition of a range of useful resources, discussed in the previous sections.

The third disciplinary strand in this movement is the economics of happiness. This refers to the move by some economists from exclusive use of 'revealed preferences' to self-reported accounts of satisfaction with life or happiness (Frey and Stutzer 2002). It combines techniques used by economists and psychologists to assess wellbeing, and explores areas where revealed preferences provide limited information (for example, the effect on wellbeing of inequality or unemployment). Happiness economics marks a return to the idea, and more importantly the measurement, of utility, as practitioners argue that asking people to report their SWB provides a 'satisfactory empirical approximation to individual utility' (Frey and Stutzer 2002: 403 ; Di Tella et al 1997; Graham forthcoming). Richard Layard's (2005) recent work takes this further, contending that happiness provides both an overall motivating device akin to Bentham's balance of pleasure and pain, and a unifying principle to guide policy (see also Collard 2003). Two centuries on, utility has been reshaped as a respectable concept in economics.[27]

Despite this accumulating understanding, there are persistent problems in researching happiness and subjective quality of life, which are multiplied when our attention turns to developing countries. First, there is the

[27] Happiness economists have been active in developing countries; for example, Graham and Pettinato on Latin-America and Russia (2002); Fafchamps and Shilpi on Nepal (Fafchamps, M. and Shilpi, F. 2003 *Subjective well-being, isolation and rivalry*, mimeo, CSAE, Department of Economics, University of Oxford) (2004); Knight, J. and Song, L. (2004) "Subjective Wellbeing and its determinants in rural China" (Mimeo); Gandhi Kingdon, G. and Knight, Jj (2004) "Community Comparisons and Subjective Wellbeing in a Divided Society" presented at Northeast Universities Development Consortium Conference, HEC Montreal, October 1-3 2004; and the recent work of Guillen-Royo and Velazco on Thailand (2006) and Ethiopia (*Exploring the determinants of happiness: evidence from rural Thailand and Ethiopia*, paper presented at the Social Policy Association Conference in Bath, June 2005). See also Rojas (2007).

pervasive propensity of people to *adapt* to changes in their life circumstances: the related phenomena of 'adaptive preferences', 'hedonic adaptation', 'the hedonic treadmill', or 'response shift' (Cummins and Nistico 2002; Frederic and Loewenstein 1999; Parducci 1995; Schwartz and Sprangers 1999). This involves the unconscious process of adjusting expectations to reality, through either a recalibration of one's internal standards or a reprioritisation of one's values. This ability to adapt would appear to be a ubiquitous feature of the human condition and applies to individual losses (physical disablement) and gains (winning the lottery) (Brickman et al 1978), and to collective misfortunes (natural disasters) and improvements (economic growth and prosperity). All confound any simple reliance on subjective quality of life scores when making intra-personal comparisons or comparisons over time.

A more ambitious model of adaptation is provided by Cummins' 'homeostatic theory of SWB' which proposes an evolutionary mechanism for the predominantly positive life evaluations which most people display. Essentially a 'dispositional brain system' keeps individual life satisfaction in a narrow, positive range, partly through a 'conscious "buffering system"' of 'positive cognitive biases' like self-esteem, perceived control, and optimism (2002). Cummins proposes a linear pathway to SWB from environment ('mild extrinsic conditions'), to successful adaptation, to perceptions of need satisfaction (Cummins, Gullone and Lau 2002). The stability of life satisfaction in this model might seem to be a problem; however, Cummins maintains that 'the fact that it is generally predictable and stable enhances its usefulness […] because the values for subjective QoL can be referenced to a normative range [which] is homeostatically maintained' (2002). This provides the best way of identifying an 'aversive environment' (2002). However, further empirical research shows that adaptation does not apply to all life events and that some people do not return to their previous level of SWB[28]. Nevertheless, the universal human capability to adapt raises difficult questions concerning the interpretation and comparison of measures of SWB.

A second, related problem is the role of 'social comparison'. When making a coherent response to an abstract question about subjective wellbeing, people typically utilise 'frames' (Kahneman & Tverskey 1984), including the

[28] See studies of divorce (Lucas et al 2003), bereavement (Stroebe et al 1996), and unemployment (Clark et al 2004).

performance of others (Buunk & Gibbons 2000; Parducci 1995), in order to manage stress or anxiety, or increase self-esteem and motivation. If we assume that people like to maintain a positive self-view, they can reinforce this by their choice of reference group or area for comparison[29]. For example Michalos' study of over 18,000 students in thirty-nine countries found that the 'comparison gap' was the strongest correlate of life satisfaction, happiness, and people's satisfaction with their health, far stronger, in fact, than their objective health status (1991).

When researching SWB in developing countries, further problems are encountered, or old ones exacerbated. One concerns issues of cultural bias and preferences, illustrated by the small but growing corpus of cross-cultural empirical research. Diener and Suh (1999) report a strong positive correlation across countries between national values of individualism and reported subjective wellbeing (though this is confounded by another correlation between individualism and income per head). One crucial problem is that 'SWB appears to be a more salient concept for individualists'. Another issue is that 'individualists tend to weight their emotional experiences heavily whereas collectivists emphasise interpersonal factors when they construct life satisfaction judgments' (Diener and Suh 1999:442). Christopher (1999) identifies a greater emphasis on other-centred emotions, and a 'modesty bias' in evaluating SWB in East Asian cultures (such as Chinese, Japanese and Korean), the opposite to the 'global positivity bias' found in North America (Strack et al 1990). These findings lend support to theoretical concerns about cultural bias. The very concept of SWB and the research designs to tap it appears to generate higher levels of SWB in more Western, individualist cultures.

Lastly, there is the impact of harsh or 'aversive' environments on the suitability and cogency of 'happiness' as a general indicator of wellbeing. Peterson (1999:289-290) stresses that theories of personal control are 'transactional, spanning the individual and the environment and being concerned in particular with the interplay between the two … Personal control is both a cause and a consequence of the way people respond to their environment'. Increasing people's self-efficacy, a common aim of social development interventions, can therefore give the erroneous and dangerous impression that 'powerless people can always control their lives if they wish,

[29] Flexibility in the choice of areas for evaluation is characterised as 'conceptual-referent' theory within economics (Rojas 2003) and 'selective evaluation' within psychology (Taylor et al 1983).

[placing] the blame for continued oppression on the dysfunctional thinking of the oppressed' (Franzblau and Moore 2000:93-94). Happiness or perceived self-efficacy may not necessarily be helpful in hostile environments. The literature on 'depressive realism' finds that people exhibiting depression may exhibit greater realism in assessing the challenges they face: they are 'sadder but wiser' (Alloy and Ackerman 1988). 'To paraphrase a famous aphorism, hedonic adaptation "provides the serenity to accept the things one cannot change, the courage to change the things one can, and wisdom to know the difference"' (Frederick and Loewenstein 1999:303). If a person's life-goals are not 'congruent' with either themselves or their environment, both SWB and psychological need fulfilment may suffer (Ryan et al 1996; Sheldon et al 2004).

On the other hand, much research upholds the universal importance of *hope* to subjective wellbeing. 'A large body of research points clearly to the fact that feeling competent and confident with respect to valued goals is associated with enhanced wellbeing. Furthermore, it is clear that goal progress, on average, predicts enhanced wellbeing, particularly goals that are rated as important' (Ryan and Deci 2001:156). This echoes the emphasis in THN on self-confidence as a component of autonomy (Doyal and Gough 1991:63). Furthermore, c*ritical* autonomy is essential in navigating through life and in making such judgments. This is especially so when environments change rapidly, as in the present era for many in the developing world, and when existing cultural repertoires cannot keep pace. Such enduring dilemmas cannot be resolved simply by researching 'happiness' – something more akin to eudaimonic wellbeing is called for[30].

At present, the overwhelming proportion of individual-level research into SWB or subjective quality of life uses samples of people from the rich countries – indeed, predominantly psychology students at American universities! The applicability of many of these findings to the poor, the insecure, the trapped and the exploited is, to say the least, unproven. This returns us to the participatory poverty research in development studies discussed above and its relation to SWB research. The WeD group is exploring their congruence and mutual support, especially in defining, (i.e.

[30] See Ryan and Sapp (2007). This is recognised by the Positive Psychology movement within psychology, which not only promotes 'positive [emotional] experiences' but also 'seeks to understand and build the strengths and virtues that enable individuals and communities to thrive' http://www.positivepsychology.org/executivesummary.htm

generating content for) measures of subjective QoL and wellbeing. However, as White and Pettit (2004) point out, this work makes a sharp distinction between the *relational* approach, researching people's knowledge and worldviews within specific cultural frames of reference, and the *subjective* approach, measuring individual SWB in a more quantitative way. The former is more typical of some of the resource profiles approaches discussed in the previous section and must be distinguished from research into QoL and SWB. The relationship between the two is explored further by McGregor (2007).

5. THE 3 APPROACHES: LINKS AND TENSIONS

In WeD's forthcoming book, Bevan (2007) proposes a framework for understanding the intellectual barriers to the trans-disciplinary study of poverty and wellbeing. The Foundations of Knowledge Framework (FoKF) identifies nine elements of assumption and presumption, either explicit or implicit, that require careful consideration if meaningful progress in trans-disciplinary communication is to be achieved. We will here use her framework to identify the links and tensions between the three approaches surveyed above.

The FoKF identifies nine foundational elements of conceptual thinking in the social sciences as they attempt to study poverty: the domain or research question, the value or normative standpoint, the ontology or underlying assumptions about the nature of the world, the epistemology or ways of knowing about the world, the central theories and models, the associated methodologies and modes of analysis, the nature of the empirical findings, the rhetorical language in which the results are couched, and the implications for policy and practice. These, she argues, generate the intellectual barriers to successful multi or inter-disciplinary communication and work. All nine must be considered when academics from different disciplinary or sub-disciplinary backgrounds come together in efforts to collaborate effectively. The Framework is essentially a means of making explicit what assumptions, presumptions or blind spots are present in particular disciplinary contributions to the study of poverty or wellbeing.

At first sight the 'knowledge foundations' of the *Theory of Human Need* approach and the *Resource Profiles Framework* could hardly be more different. Yet, there are at least three common features. First, both eschew a hard and fast distinction between goals and means: need-satisfactions,

achieved functionings or capability sets can, and usually do, form resources in the next time period. The commonplace dichotomy between ends and means disappears once the ontology of real people acting in time is adopted (Qizilbash 2002). Second, social relationships and 'culture' are important satisfiers of basic needs. This applies to 'culture' as both successful repertoire to meet recurrent 'environmental' challenge, and 'culture' as a source of meaning and identity in the constitution of social life. Both aspects provide elements of security and immediate need satisfaction, enable people to do and to be; in other words constitute part of a person's wellbeing. Third, higher levels of need satisfaction (or larger capability sets) will usually expand people's abilities successfully to meet new environmental challenges and thus enhance their autonomy and wellbeing. There is a potential positive feedback between need satisfaction and sustainable social forms of life.

There are also tensions between the two approaches that hinge around the place of 'culture' in a wellbeing framework. Specific cultural practices can be both a form of moral bonding and source of meaning, and can block the critical autonomy of persons and groups. History and the current news is replete with cases where local cultural practices – in North and South - conflict with notions of universal human needs and recognised human rights (Gough 2004). As a result, people can be forced into relationships whereby their wellbeing is grossly compromised, or is only achievable at the costs of adverse dependence on more powerful others[31] (McGregor 1989, 1994, Wood 2002). This in turn can reproduce poverty and exclusion over time, as in Figueroa's sigma society[32] model described by Copestake (2007). Taking a different example, we know that the addiction to consumption fostered in late capitalist societies undermines happiness and threatens global sustainability. In both situations, new ways of fostering critical autonomy are urgently required; in the process it is unlikely that existing cultural practices will remain unquestioned.

What are the links and tensions between the *Theory of Human Need* and the *QoL/SWB* approaches? Despite quite different foundations of

[31] What Wood has labelled a 'Faustian bargain' (2002),

[32] The sigma society model developed by Figueroa is used to explain persistent inequality and relative poverty as a low level equilibrium trap. Its theoretical originality rests in demonstrating that economic dualism can be endogenous to a general equilibrium model that assumes all actors are rational and self-interested in pursuit of their material interests.

knowledge there is a considerable overlap in the empirical results. Cross-national studies of QoL find high cross-cultural validity suggesting a high degree of universality. A comparison of the list of common domains and indicators developed within the WHOQOL group with the basic and intermediate needs of THN finds a considerable overlap across items, excepting for critical autonomy (Camfield and Skevington 2003). This is backed up by other studies of local values, such as that undertaken by Clark in two poor communities in South Africa. He concludes that there is much agreement between local and external conceptions of needs and goals (Clark 2002; Clark and Gough 2005).

Yet despite this agreement between the human needs and subjective QoL approaches, their conceptual origins remain quite distinct and cannot be ignored. The universal presence of 'habitus', of the taken-for-granted, of adaptation and endogenous preference formation, continually throws up areas where wants clash with needs. Using Gasper's framework of need, some human drives are potentially non-functional or dangerous, while 'some ethical priority goals lack motivational force'. Humans posses two informational systems, genetics and culture, and there is no necessary reasons for the two to generate corresponding patterns of behaviour (Durham 1991). On the other hand, certain functional dispositions, such as self-confidence and goal achievement, emerge as critical components of subjective wellbeing and happiness and hence presumably reflect both genetic and cultural evolution.

Finally, notwithstanding their very different foundations of knowledge, there are at least two, perhaps unexpected, links between the *Resource Profiles Framework* and the *QoL/SWB* frameworks. First, the research findings on variations in SWB across nations demonstrate that income contributes little to SWB above a moderate threshold (Helliwell 2000). This provides new justifications to the search for a more encompassing notion of resources with which to understand the construction of wellbeing. We also develop the idea of 'resourcefulness' to help us better understand the resilience of people operating in extremely impoverished and challenging circumstances (Camfield and McGregor 2005). Second, both approaches emphasise the study of local values and meanings. Several psychological theories interpret subjective quality of life in terms of the gap between a person's actual status and the local standards and status of their peers within their community or other relevant reference groups. Similarly the 'thinking-doing' branch of the

RPF emphasises the cultural construction of wellbeing, the imbrications of local values and identities in any understanding of quality of life.

We conclude that sufficient bridges exist between the needs, resources and QoL frameworks to construct an integrated conceptual model and to justify an integrated programme of research into wellbeing. A subsequent Working Paper will set out a unified theory of wellbeing applicable to development contexts and a coherent methodology for researching it.

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