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research methods: perspectives in the
context of development socio-
anthropology**

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Introduction

The study of policy processes has been a field of study which has become increasingly important over the last 20 years in the social sciences. The core notion of 'policy process' is that policies are formulated and implemented in concrete social and historical contexts, and that these contexts matter (Mooij and Vos 2003: v). 'Policy process' is in contrast to 'policy as prescription', which assumes that policies are the result of a rational process of problem identification by an external agent (usually the government or the State) which already knows what is best for its citizens (Mackintosh 1992).

While different disciplines have been interested in the study of these processes, in this paper I will pay particular attention to approaches that can be situated in the context of the socio-anthropology of development. This expression is used in order to underline the convergence between anthropology and a certain type of sociology inherited from the Chicago School, often described as "qualitative". A central premise of this approach is that the complex interaction between actors' 'projects' and practices, their intended and unintended outcomes, create both the constraining and enabling framework of social action (Long 2001: 4).

Beyond this introduction, the paper is organized in four sections. The first one introduces the topic of policy processes, mainly from the point of view of political science. The second section illustrates different approaches of the socio-anthropology of development, paying particular attention to a broad perspective that can be called *methodological interactionism*. Within this approach I will situate different research styles or perspectives that I consider helpful for the study of development interventions for poverty alleviation. As qualitative methods have an important place in all these approaches, in the third section I will briefly state the important role that qualitative analysis can have in policy research. The fourth section closes the paper with a brief overview of the advantages of the complementarity of quantitative and qualitative research.

1. Policy Processes and Models of Planned Intervention

Policy processes are a particular type of policy study, which is a blend of political science, sociology and anthropology, and its subject matter is the way in which policy is given shape in concrete historical processes (Mooij 2003) For this perspective, policies are not 'natural phenomena' or 'automatic solutions' resulting from particular social problems, so the why, how and by whom questions should be treated as empirical questions, and it is concrete empirical research that can generate the answers.

In the study of policy processes, the linear model of planned intervention was dominant from the 1960s to the 1980s (deLeon 1999: 23). This model assumed that the policy process consisted of various successive phases or stages: agenda setting, policy formulation, implementation, evaluation, etc. In this way, strong separation was drawn between the 'formulation', 'implementation' and 'outcomes' of policy. Policymaking was seen as a rational, balanced, objective and analytical problem solving process.

The linear approach assumed that planners deal with different issues in a rational way, going through each logical stage of the process, and carefully reflecting on all the relevant information. This meant policy makers were able to avoid responsibility through blaming the failure of a programme or a project on inadequate political will or lack of sufficient resources in the implementation phase (see Clay and Schaffer 1984b; Apthorpe 1986; Jenkins-Smith and Sabatier 1993). In addition, the emphasis on the instrumental and technical nature of the policy process led to a blurring of the reality that policy processes are inherently political and shaped by different contexts of interaction or social domains (Shore and Wright 1997: 8). Foucault introduces the term 'political technology' with reference to this process of policy 'depoliticization' (Burchell *et al.* 1991).

Closely linked with the linear approach model was the model of the 'administrative man', the rational decision-maker in the policy making process (Arce 2001). Critics of the 'administrative man' model suggested that absolute rationality in social actors was impossible and showed how policy makers acted cautiously and learned from their mistakes in an incremental way (Lindblom 1959). Critics of the top-down approach pointed out that much of the existing literature on policy processes tended to have a 'managerial' perspective, ignoring issues such as power relations, conflicting interests and value systems involving the individuals and agencies responsible for making policy and those responsible for taking action (Barrett and Fudge 1981: 4).

In the late 1970s and early 1980s, new 'bottom up' studies paid attention to the implementation of policies. Before this time, the linear model of state intervention, whilst recognising agency¹ as an important input in the policy process, had conceptualised it within the context of decision-making rather than in the domain of policy implementation (Marinetti 1999). A broader picture of the policy process appeared, characterized by an interest in highlighting its

complexity and the centrality of implementation for understanding the link between policy goals and outcomes (Grindle and Thomas 1991; Keeley and Scoones 1999). Implementation began to be seen as a space where policy is created or changed (Lipsky 1980), while implementers should not be understood as simply agents who 'put into action' what designers have created. Implementers are actors, capable of adapting, co-opting or ignoring policies, and in that sense, their actions are critical to an understanding of the development of policy initiatives (Juma and Clark 1995) as well as the transactional nature of project implementation (Warwick 1982).

This new trend to analyse policy process was strengthened by Theda Skocpol's work (1979; 1985), where she insisted that the analysis of State institutions should focus on the existing contradictions inside State agencies and organizations. This was a critical point of departure for the study of social transformation and policy processes which involved an understanding of the State which was not characterised by a homogeneity of purposes and orientation, but rather, was full of tensions, struggles and negotiations.ⁱⁱ

Some other key work falls within the context of this new trend in the conceptualisation and study of the processes of policy implementation. Grindle (1980; 1985; 1991 with Thomas), for instance, focuses on the dynamics of the interaction between the state bureaucrats and social forces, paying attention to the interfaces between elites, without examining the point of service delivery. The work of Schaffer (Schaffer and Lamb 1974; Schaffer and Wan-Shien 1975; Schaffer 1986) and Wood (1985) has signalled the way in which development interventions go together with forms of labelling that stigmatise people, and so reduces their capacity to engage in autonomous organizations. Social control, the legitimacy of state intervention, and the de-politicisation of that intervention are central concepts for them.

The development of the policy processes mentioned above could be easily situated in the domain of political science. Other disciplines have also tried to build a broader picture of the policy process (for an overview of several of these approaches see Sutton 1999; de Vibe *et al.* 2002; Mooij 2003). I want to discuss now the perspective of *development socio-anthropology*.

2. *Development Socio-Anthropology and the Policy Process*

The expression *development socio-anthropology* brings together perspectives of the *anthropology of development* and *development sociology*.

In fact, development socio-anthropology is merely a way of going about socio-anthropology, that is a way of carrying out empirical field enquiries leading to new ways of understanding social phenomena, based on contemporary objects. Development is just one of a range of topics, but one which presents some specific characteristics: in countries of the South

...it is omnipresent and “inevitable”. It comprises considerable social stakes at the local and national levels, and is interwoven with interactions between actors originating in particularly heterogeneous social and professional worlds. (Olivier de Sardan 2005).

In his review of studies in the anthropology of development, Olivier de Sardan (ibid) identifies three main approaches: discursive, populist and methodological interactionist approaches to development. The studies he includes in the category of the *discursive approach*ⁱⁱⁱ have criticized the ‘development discourse’ in different ways, with the aim of “deconstructing” it. These studies have tended “to produce a caricatural reduction of the developmentalist configuration, which they present as a “narrative” of western hegemony bent on denying or destroying popular practices and knowledge’ (Olivier de Sardan 2005). This discursive approach is criticised for its view of

...development as a monolithic enterprise, heavily controlled from the top, convinced of the superiority of its own wisdom and impervious to local knowledge, or indeed common sense experience, a single gaze or voice which is all powerful and beyond influence. (Grillo 1997: 20).

This perspective pays very little attention to the contradictions and uncertainties that characterize development institutions, and the reactions and strategies that their intended beneficiaries deploy.

The *populist approach* in development anthropology includes various types, so it is important to have in mind the distinction between ‘ideological’ and ‘methodological’ populism (Olivier de Sardan 1995). While ideological populism has a romantic vision of indigenous knowledge as well as an idealization of the competences of local people, methodological populism recognises that all the actors have knowledge and deploy strategies, which should be carefully described and analysed. The work of Robert Chambers (1983; 1994) would be a clear example of an ideological populist approach, while others such as Scott (1985; 1998), Darré (1996), and Scoones and Thompson (1994) present a more complex mix of ideological populism and methodological populism. These authors, for instance, argue for the necessity of an approach that overcomes the simple binary opposition between external and local actors, or between ‘scientific’ and ‘indigenous’ knowledge.

Oliver de Sardan (2005). states that a third phase of the relationship between research and development in the socio-anthropology of development has arisen, characterized by an interest in complex, non-uniform interactions, in conflicts and bargaining, and in processes of transaction He called this ‘*methodological interactionism*’ or ‘*entangled social logic approaches*’.

Instead of focusing exclusively on popular knowledge, as in the populist approach, or on denouncing the developmentalist configuration and its discourse, as in the deconstructionist approach, the entangled social logic

approach, centred on the analysis of embeddedness, of social logic, studies the relationship between both universes, or rather between the concrete segments of both, through empirical enquiry into their points of intersection. (Olivier de Sardan 2005).

It is important to stress that the emphasis on social interactions is to use them 'as productive pathways into social reality, as means of deciphering concrete social situations, both in terms of actors' strategies and contextual constraints, and as means of approaching practices and conceptions, of pinpointing conjunctural and structural phenomena' (Olivier de Sardan 2005).

Different approaches and perspectives can be situated in this branch of the socio-anthropology of development. I will briefly introduce four of them in order to show their common characteristics, and the way in which they could add information and knowledge to the study of policy processes. These perspectives are (1) the Actor-Oriented approach, (2) the ECRIS procedure; (3) the FAO guidelines for studying livelihoods and local institutions; and (4) the LORPA methodology.

(A) The Actor-Oriented Approach

Norman Long and his colleagues at the Wageningen Agricultural University, in the Netherlands, have mainly developed this approach. Long (1989; 1992; 2001) has tried to differentiate his style of analysis from previous approaches such as the transactional and decision-making models, symbolic interactionist and phenomenological analysis, which were popular in the 1960s and 1970s, and adopted a voluntaristic view of decision-making, or extreme forms of methodological individualism.^{iv} The originality of the actor-oriented approach lies in the move of the analysis of agency from the hierarchical organizational domain to the analysis of the interface between front-line officials and the public (Arce 2001: 4). The concept of human agency starts from the notion that the individual has the knowledge and the capability to understand social experiences and to act upon the challenges of everyday life.^v In contrast to voluntaristic approaches, the Actor-Oriented Approach considers that agency emerges from social processes, is composed of social relations, and can only become effective through them.

The insight that the notion of agency can give to the analysis is to show that all actors exercise some kind of power, including those who appear to be powerless.^{vi} A central question for research, then, is how actors -within the existing constraints- find room for manoeuvre to realize their projects. The actor-oriented approach, while remaining distinguishable from methodological individualism, can illuminate the micro-foundations of macro-processes without implying radically individualist or reductionist assumptions (Booth 1994: 19). Adopting this approach also has implications for the way in which different

analytical issues are conceptualised. For instance, the conceptualisation of intervention is key to the study of policy processes:

Intervention is an ongoing transformational process that is constantly reshaped by its own internal organizational and political dynamic and by the specific conditions it encounters or itself creates, including the responses and strategies of local and regional groups who may struggle to define and defend their own social spaces, cultural boundaries and positions within the wider power field. (Long and van der Ploeg 1994: 79).

In the analysis of policy processes, the Actor-Oriented Approach seeks to elucidate the types and sources of social discontinuity and linkage present in development situations and to identify the organizational and cultural means of reproducing or transforming them. In this way it can help to give a better understanding of the complexity of policy transformation processes, paying attention to the multiple actors (more or less directly) involved in experiences of planned interventions. The notion of social interface (Long 1989) becomes an analytical tool to explore and understand issues of social heterogeneity, cultural diversity, and the conflicts inherent in processes involving external interventions.

I made an explicit use of the Actor-Oriented Approach in my PhD thesis (Rodríguez Bilella 2004), adopting the notion of 'the field of rural development' as an analytical tool to critique a mechanistic view of rural development, paying particular attention to the 'social life of rural development' (Arce *et al.* 1994). I contextualised the use of the actor-oriented approach in the field of policy processes (Clay and Schaffer 1984a; Juma and Clark 1995; Hill 1997; Turner and Hulme 1997) stressing the relationship between knowledge and the transformation of policy during its implementation (Keeley and Scoones 1999: 3). The central concern of the thesis was to illuminate the complexity of intervention processes through a better understanding of how planned development programmes are not only transformed during their implementation but are also essentially constituted by the interface encounters between different actors.

The field of rural development was understood as a field of social interaction, socially and discursively constructed, constituted by social meanings and practices negotiated at different interface encounters where a particular 'external' intervention (the Agricultural Social Programme –PSA- in Argentina) was one among many other actors. I examined PSA implementation in a number of different settings, and the different case studies presented functioned as methodological entry points for the enquiry as well as a means to open the 'black box' of the intervention. My interest in paying attention to different arenas of conflicts linked to the implementation of the PSA derived from an approach to understanding social interventions which sees them as constituting a social field where different groups compete with each other for

material, symbolic or institutional resources (Bierschenk 1988), constituting themselves as political systems in which different perspectives contend for influence (Mosse 1998: 21).

The PSA, as an example of a Social Fund and the new way of State intervention, was the result –in a particular historical, social and political context- of the complex interlocking of a plurality of actors. The PSA development implied an exercise of power expressed through its strategy of action - interest in targeting, constituting groups and building organizations. The way in which these elements were deployed implied, most of the time, ignoring the actual forms of organization, marketing and reproduction of small farmers' households. As a result, the new proposed forms of organizations were fragile and unsustainable, more prone to create division, conflict and resistance between social groups than to establish common perceptions and shared values (Long 2001: 88).

(B) ECRIS: Rapid Collective Inquiry for the Identification of Conflicts and Strategic Groups

ECRIS is the acronym for *Enquêt Collective Rapide d'Identification des Conflits et des Groups Stratégiques* (Bierschenk and Olivier de Sardan 1997), a research procedure developed closely linked with the work of APAD (*Association euro-Africaine pour l'anthropologie du changement sociale et du développement*). This organization has argued that the huge changes in rural areas brought about by international development agencies cannot be comprehended through a macro-level political economy of development, or by political science that focuses too much on national level politics, rent-seeking behaviour or corruption, to the exclusion of 'the local'. Instead, the tools of the social sciences most concerned with localities and their change -anthropology, sociology, development studies, etc.- are essential to explain the potentially conflictual, power-laden and political interplay of communities and development institutions, primarily in local arenas (Olivier de Sardan 1995).

ECRIS has been field tested in several African countries, specifically in local development projects. This six-phase model attempts to identify common empirical indicators of conflict, understanding that its identification also offers a way to penetrate the facade of consensus and the beautiful external scenario frequently presented by the actors in a local society to external intervenors or researchers. Conflict is understood as one of the best 'vital leads' for penetrating a society and revealing its norms and codes as well as structure. *Strategic groups* manifest themselves as predominantly empirical social aggregates of variable geometry, composed of actors who defend shared interests in the appropriation of resources, in particular by means of social and political action.

In the ECRIS-procedure a team of researchers visit different villages. The researcher who studied the position of women in village A would come to study the position of the shepherds in village B. These triangulation strategies contribute to produce more thoroughly corroborated observations about reality (as it is perceived) (Olivier de Sardan 2001). It also helps to formulate hypotheses on the nature of strategic groups in the face of a given "issue". Later, the field inquiry would show whether or not such hypotheses are applicable; whether it would be necessary to redefine the strategic groups; which the "real" nature of their social existence is, and whether or not they are able to devise and implement collective strategies and enter into alliances (Bierschenk and Olivier de Sardan 1997: 240-241).

(C) Livelihoods and Local Institutions: the FAO Guidelines

The combination of the perspectives of the institutionalism (North 1990; Bastiaensen *et al.* 2002) with the sustainable livelihood approach^{vii} (Scoones 1998; Krantz 2001) stemmed from the awareness that it is not enough to understand the people with whom development interventions are working with, but also their social, cultural and political context. The term "institution", then, includes a broad range of **organizations, policies** and **processes** that may influence both the choices that households make about using their assets, and the types and amount of assets that they are able to access (Messer and Townsley 2003).

The key element of this approach is that it helps to understand how new institutions which are set up to support the poor have often proved inappropriate or have been undermined by existing institutions that were either not recognized by relevant stakeholders or poorly understood (Nuijten 2001). Although participatory approaches to development have done much to improve the ways of learning about local conditions and understand the strengths of the poor and the constraints they have to overcome, much less attention has been paid to ways of understanding the local institutions that shape the environment in which poor people live (Mosse 1995).

Taking account of the livelihood assets at their disposal, the vulnerability context in which they operate, and the policies, institutions and processes around them, households tend to develop the most appropriate livelihood strategy possible. These strategies may lead to more or less satisfactory livelihood outcomes - poverty is the result of "unsatisfactory" livelihood strategies, because the strategies are based on insufficient livelihood assets, they are vulnerable to shocks and changes, and/or the policies, institutions and processes they are subject to do not support them effectively. The aim of the investigation

... is to understand how this whole range of local institutions affects the livelihoods of people in a particular area. (Messer and Townsley 2003: 15)

The FAO guidelines (Messer and Townsley 2003) focus on the research of the **community**, the **households** within that community and their **livelihood strategies**, and **institutions** that may be found at all levels, from within the household to the community, and in society at large. The final and most important output of the investigation is the definition of the linkages between livelihoods and institutions.

(D) LORPA: Local Organisations in Rural Poverty Alleviation

This was a programme initiated within the Danish Centre for Development Research in 1996, concerned with the potentials that different types of local organisations might have for bringing about changes in both the conditions of specific groups of the poor as well as in the structural contexts that give rise to and support their poverties (Webster 1998). At the methodological level, LORPA has sought to contribute to the drafting of inter-disciplinary fieldwork strategies including a number of mapping exercises, beginning with organizations and organizing practices, and poverty (Webster and Engberg-Pedersen 2002).

The methodology of LORPA brings together a large number of researchers and topics, with a central concern in comparative studies in order to understand how different forms of state-local relations affect and shape the conditions for a rural development strategy with a strong pro-poor dimension. Similar attention is paid to issues of identity and identity formation (ethnicity, gender, religion, occupation, etc.) as a basis for collective action amongst the rural poor, the role that institution formation/reformation in central markets bares for particular groups of the poor, e.g. irrigation, land, credit, agricultural labour; the need to theoretically assess local institutions' relationship with the poor, particularly the degree in which different local institutions can better facilitate the poor's mobilization and participation in development, etc.

This approach was initially linked with *The "Guide d'Approche des Institutions Locales (GAIL)"* (Jacob *et al.* 1994), which defines local government broadly and where issues of legitimacy, willingness and capacity of local-level administration, local organizations (e.g., village committees, farmers coops, etc.), and community institutions (e.g., a lineage, or the "village") are explored.

3. Reflections about Qualitative Methods and the Study of Policy Processes

The research approaches introduced above have in common some general characteristics: a concern with the local arenas and its changes; the conceptualization of intervention as constituting a social field, conflicts as a vital lead to reveal norms, codes and structures; and power and knowledge as central issues involved in the link between livelihoods and local institutions. This section will discuss how qualitative methods can fruitfully complement the quantitative ones in a way that both can highlight important features with respect to the analysis of contemporary policy processes and development interventions.

The practical and philosophical inadequacies of a positivistic natural sciences-type approach have been commonplace in the academic literature for a long time, stressing how it takes a narrow view of human motivation by assuming the widespread existence of rational utility maximisation (Bernard 1995; Gartrell and Gartrell 2002). While different measures in the field of nutrition, for instance, may be indispensable, they do not, by themselves, give access to the world of meanings, choices and resultant behaviours. We may know what happens but not, in intersubjective terms, why. Subjectivity is a distinguishing attribute of the policy sciences, and qualitative methods are useful means for studying it by the explicit commitment to grounding the researcher's interpretation in the perception of those involved in the field of study.

Qualitative methods are part of the tradition in the social sciences where the key is to watch and to interact with people in their own "territory" and to use their own language, instead of a technical one. These methods help to acknowledge that household livelihood strategies and local institutions are highly dynamic and complex. Many of their dimensions as well as their interaction can only really be understood through extensive observation and contact, and not through a "one-off" investigation. By being flexible, opportunistic and heuristic, qualitative methods provide more appropriate techniques to probe the motives that lead to behaviours (though the behaviours themselves may be quantifiable) (Parker and Kozel 2004).

In the field of policy research, qualitative methods can get to the parts which experimental methods cannot reach: the former can be used even when the researcher cannot determine the goals of a particular intervention, cannot control the inputs to the situation being studied, or can only imprecisely measure outputs. In this sense, they are particularly useful in providing information about social costs and impacts on social relationships that are not known *a priori* (as well as difficult to quantify), about the processes that link cause and effect, and about how beneficiaries understand the way policies or projects have affected them (Kerr and Chung 2001). Qualitative research is often concerned with broad rather than narrow questions, with "illuminative

evaluation” of the policy process rather than the quantification of inputs and outputs (Patton 1987; Roth and Mehta 2002).

Alongside its advantages, the use of qualitative methods has been seen by academics and policy practitioners as insufficiently “rigorous” or “objective”, at least compared with experimental methods or with the quantification of modern economics. Although every method can be executed in ways which cast doubt on their validity (White 2002), it is generally accepted that qualitative methods score high with regard to external validity (the extent to which their insights reflect the external world), but they are poor with regard to internal validity (Kirk and Miller 1986). This is in neat contrast to the scientific and neoclassical economic approaches, by large the preferred approaches amongst most policy administrators, which tend to produce neat, quantitative and prescriptive outcomes. Qualitative analysis is concerned with handling highly subjective data, characterized by its richness and untidiness. Thus recording, ordering and presenting data results in a critical aspect of this perspective (Van Maanen 1988; Huberman and Miles 1994; Dey 1998). At the same time, qualitative analysis is hard to aggregate and tends to be less convincing for policy makers (Yin 1989; Rist 1994).

In order to overcome some of these weaknesses, the use of qualitative methods could increase its acceptability in policy circles by following some guidelines and techniques that may help to increase their rigour (Pollitt *et al.* 1990). The qualitative component can contribute to validity^{viii} by ensuring that the questions being asked are appropriate to actual conditions on the ground and that the interpretation of results is accurate, while quantitative research can ensure reliability and representativeness. Some recommendations to increase the validity of the research (or validity-seeking devices) that involves qualitative methods are the following (Jick 1979; Pollitt *et al.* 1990; Becker 1998; Wolfinger 2002; Miller and Fredericks 2003) :

- ✓ Fieldwork should not be completely open-ended, but substantially guided by explicit theories and hypotheses.
- ✓ Wherever possible, important evidence should be checked through a variety of sources –triangulation-.
- ✓ Loosely-structured interviews should allow respondents plenty of room to develop their own perspectives and agendas.
- ✓ The methods of observation and enquiry should be fairly fully documented.
- ✓ Wherever possible, some instance of respondents’ validation should be sought.
- ✓ The use of counterfactuals panel is recommended: this is an answer to the question “What would have happened if the development intervention (or project, etc.) had not been introduced?”.

Rao and Woolcock (2003) consider that qualitative and quantitative methods can be integrated in three different forms, which they call *parallel*,

sequential, and *iterative*. While in parallel approaches the quantitative and qualitative research teams work separately comparing and combining findings during the analysis phase, the sequential and iterative approaches—which they call *participatory econometrics*^{ix} (Rao and Ibáñez 2004)—imply varying degrees of dialogue between both traditions at all phases of the research cycle. Although these two approaches are the most technically complex and time consuming, they are where the greatest gains are to be found from mixing methods in project and policy evaluation. For instance, the hints given by the qualitative material (like people’s concerns, expectations, views) could illuminate the survey design (London *et al.* 2004). Although the desirable situation is that the elements of one approach inform and affect the elements of the other in an iterative way (Brewer and Hunter 1989), the concrete option chosen will depend on the research questions and design, as well as the resources available.

4. Conclusions

The research perspectives discussed in this paper (Actor-Oriented Approach, ECRIS, Livelihoods and local institutions, LORPA) consider that policy processes in general and development interventions in particular involve the deployment of politics and cultural repertoires. There is nothing natural or automatic in them; on the contrary, they are social processes whose outcomes cannot be established in advance (Mooij 2003). Policy intervention should also be regarded as ‘multiple realities’ made up of differing cultural perceptions and social interests (Long 2001: 30), constituted from a complex set of relationships, interests and ideas socially defined by the different actors involved who deconstruct, transform and incorporate the external intervention into their own projects (Mongbo 1995; Hilhorst 2000: 117). The central point of this paper has been to show that all these processes can be fruitfully explored by the use of qualitative methods and sociological perspectives in approaching the issues of local institutions, community participation, institutional dynamics, power relationships, and conflicting interests and value systems at the interface among a plurality of social actors (Place *et al.* 2003).

Poor people themselves play a central role in solving their problems, by attempting to improve their lives and tackling problems that threaten their existence. If these activities and people’s aspirations are not taken into account by policies and projects, they could end up being counterproductive. The research approaches presented in this paper, as well as their use of qualitative methods, pay particular attention to the strategies followed by people to provide themselves with a living in normal and difficult times, as well as allowing room for the discovery of livelihood and coping strategies that do not lead to improvements.

The recent literature has insisted that the complementary use of qualitative and quantitative methods improves the overall quality of the studies and the validity of results (Maxwell 1998; Kanbur 2003). However, the use of complementary methods is not free of difficulties, as it includes extra costs (both in financial and human terms), and the need for teamwork and respect for different methodological and epistemological positions (Stone *et al.* 2001). A useful use of complimentary research methods could only emerge when the key assumptions of the research are shared, and common research questions are identified.

Although the link from research to policy may not be straightforward (Weiss 1977, 1979; Stone *et al.* 2001), considerable added value can be reached by a systematic and strategic inclusion of more qualitative approaches in the study of policy processes and development interventions. A key challenge for the generation of knowledge around the policy process is to analyse the objective conditions of reality while identifying how perceptions influence it, overcoming the opposition between theory and research, and between quantitative and qualitative methods (Gacitúa-Marió and Wodon 2001).

By way of conclusion, I will outline some particular means by which qualitative methods can be useful in generating knowledge in the field of programme evaluation (Mosse *et al.* 1998; Rao and Woolcock 2003):

- ✓ They help to generate hypotheses grounded in the reality of the poor.
- ✓ They help to open the ‘black box’ that exists between policy prescriptions, on the one hand and poverty reducing effects on the other.
- ✓ They help to understand the nature of bias and measurement error.
- ✓ They facilitate cross-checking and replication.
- ✓ They allow the researcher to interpret the findings in context.
- ✓ They help to identify externalities to an intervention, improving the measurement of outcomes, and finding ways of measuring “unobservables”.
- ✓ They help to generate more and better quantitative data as well as highlighting the process by which an intervention works, in addition to establishing its overall final impact.

In summary, the integration of qualitative methods with survey methods has the potential value of obtaining both a contextualized understanding and findings that can be generalized (Devereux 1998; Rao and Walton 2004).

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Endnotes

ⁱ The notion of *agency* is discussed later.

ⁱⁱⁱ Nevertheless, the state-centred approach risks being insensitive to the impact of social forces on the policy processes (Arce *et al.* 1994: 153).

ⁱⁱⁱ Some of the authors in this trend are Arturo Escobar (1984-85; 1991); James Ferguson (1994; 1997); Emery M. Roe (1991; 1995); Wolfgang Sachs (1992); Crush (1995); Gardner and Lewis (1996) and Rahnama and Bawtree (1997).

^{iv} To overcome these deficiencies, Long argues against voluntaristic approaches and sees individual choices as being shaped by larger frames of meaning and action. The actor-oriented approach tries to avoid the tendency of methodological individualist explanations to explain social behaviour in terms of the individual motivations, interests, and intentions.

^v For a discussion of agency see also Barnes (2000), Deacon (1999) and Ortner (2004). A critical view of the limitations of Giddens' concept of agency is developed by Cohen (1994: 21-22).

^{vi} Agency should not be confused with complete freedom, because in every social relationship there is differential access to resources and variations in the actors' capacities to manage them competently (Cohen 1989). It should not also be understood as the result of some kind of extraordinary gift, mystical capacity, entrepreneurial flair or innovative spirit possessed by talented individuals. Agency is a socially generated and a culturally defined phenomenon that takes different forms depending on the context. In some situations one might even conclude that it hardly exists at all. (Long 2003: 8)

^{vii} For an overview of the origins of the sustainable livelihood approach see Solesbury (2003).

^{viii} Instead of validity, other authors prefer to use the concept of *verification*, as the process or mechanisms used during the process of research to incrementally contribute to ensuring the rigor of a study and to construct a solid product (Morse *et al.* 2002) or, indeed, naturalists' equivalents for internal validity, external validity, reliability and objectivity have been suggested in the terms credibility, transferability, dependability and confirmability (Guba and Lincoln 1989).

^{ix} For a discussion of participatory approaches and their possibility of generating not only qualitative insights but also quantitative data see Chambers and Mayoux (2003).

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Note for the authors:

The research report must be submitted in Windows 2000 or Windows XP, two copies on paper and one on diskette or via email, single spaced, font 14 Times new roman. Normal length is between 5000-7000 words (incl. tables and references)

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