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Palestine Economic Policy Research Institute

Palestinian National Authority



Ministry of Social Affairs

Social Protection in the West Bank and Gaza Strip

Concepts & Terminology

Garry Sotnik

April, 2011

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Universal Declaration of Human Rights

by the General Assembly of the United Nations
(Selected Articles)

Article 22

“Everyone, as a member of society, has the right to social security and is entitled to realization, through national effort and international co-operation and in accordance with the organization and resources of each State, of the economic, social and cultural rights indispensable for his dignity and the free development of his personality.”

Article 25

*“(1) Everyone has the right to a standard of living adequate for the health and well-being of himself and of his family, including food, clothing, housing and medical care and necessary social services, and the right to security in the event of unemployment, sickness, disability, widowhood, old age or other lack of livelihood in circumstances beyond his control.
...”*

Development as Freedom

by Amartya Sen

“Development requires the removal of major sources of unfreedom: poverty as well as tyranny, poor economic opportunities as well as systematic social deprivation, neglect of public facilities as well as intolerance or overactivity of repressive states. ... Sometimes the lack of substantive freedoms relates directly to economic poverty, which robs people of the freedom to satisfy hunger, or to achieve sufficient nutrition, or to obtain remedies for treatable illnesses, or the opportunity to be adequately clothed or sheltered, or to enjoy clean water or sanitary facilities. In other cases, the unfreedom links closely to the lack of public facilities and social care, such as the absence of epidemiological programs, or of organized arrangements for health care or educational facilities, or of effective institutions for the maintenance of local peace and order. In still other cases, the violation of freedom results directly from a denial of political and civil liberties by authoritarian regimes and from imposed restrictions on the freedom to participate in the social, political and economic life of the community.” (Sen, 1999, pp. 3-4)

بِسْمِ اللَّهِ الرَّحْمَنِ الرَّحِيمِ

**Palestinian National Authority
Ministry of Social Affairs
Minister's Office**



السلطة الوطنية الفلسطينية
وزارة الشؤون الاجتماعية
مكتب الوزير

Preface By Minister of Social Affairs

The Ministry of Social Affairs (MoSA) endeavours to protect Palestinian poor and marginalized groups through one national program, namely, the "Palestinian National Program for Social Protection (PNPSP)". PNPSP stems from its vision of a socially protected population over years to come. It includes the Cash Transfer Program, and other supplementary socio-economic interventions, and aimed to enable the poor to adapt, to better manage risks and to participate in the overall development processes.

MoSA, based on PNA Plan for Reform and Development (PRDP 2008-2010), the Plan for State Building for the years 2011- 2013 and Termination of Occupation, assumes the responsibility of leading the Social Protection Sector and coordinating the efforts of all partners to develop a strategy for the Sector.

To assure the well application of social protection concept and principle, to improve involvement and synergies amongst stakeholders, a social protection working group was formed from MOSA as chair of the group, EC as co-chair, and FAO – as technical advisor all active donors and NGOs working in the sector.

The objectives of the group are to:

- ✧ Define more precisely the scope of work and concept of social protection in Palestine.
- ✧ Define more precisely the typology of poor in Palestine.
- ✧ Distinct the concept of poverty and its current measurements.

This document was the first result of Social Protection Sector Working Group (SPSWG) greatly benefited from fruitful discussions that took place at all stages of its development during SPSWG meetings. This document has been jointly developed in June 2008 for the purpose of building a common understanding on goal, / specific objectives, general concept and even "jargon" of the Social protection Sector

The document is defining precisely concepts and issues like:

1. Poverty: Concept and measurement and causes of poverty.
2. Vulnerability: Concept and measurement.
3. Social Protection: Concept and application.

I hope this document will help all the key actors in Social Protection Sector.

**Majida al-Masri
Minister of Social Affairs
April 2011**

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Acronyms

CCT	Conditional Cash Transfers
CPR	Common Property Resources
DSS	Decision Support System
ECD	Early Child Development
GDP	Gross Domestic Product
IGR	Income-Gap Ratio
ILO	International Labor Organization
FAO	Food and Agriculture Organization
HDI	Human Development Index
HPI	Human Poverty Index
MAS	Palestine Economic Policy Research Institute
MoSA	Ministry of Social Affairs
NCPA	National Commission for Poverty Alleviation
PECS	Palestinian Household Expenditure and Consumption Survey
PGR	Poverty-Gap Ratio
PNA	Palestinian National Authority
PPP	Purchasing Power Parity
RBA	Rights-Based Approach
SPSWG	Social Protection Sector Working Group
UDHR	Universal Declaration of Human Rights
UNRWA	United Nations Relief and Works Agency
WBGs	West Bank and Gaza Strip

1. Poverty: Concept & Measurement

A careful distinction should be made between poverty and its measurement and defining the former by the later should be avoided. It is worth emphasizing that poverty is much broader than what our limited measurement can currently capture. However, instead of simplifying the definition of poverty to fit our limited measuring abilities, we should keep its breadth and depth in mind while continuously attempting to extend our measurement tools to capture the full scope of what poverty entails.

Subsection 1.1 focuses on the concept of poverty, while subsection 1.2 focuses on the available tools for measuring it.

1.1 Concept

Poverty is a condition that some people live in. While these individuals are referred to as the poor, their status is not an inherent trait but only a reflection of their current condition, a condition that can and should be overcome.

1.1.1 Causes and Effects

In deliberation of the concept of poverty, it is useful to consider the causes and effects that perpetuate it. A diverse multitude of causes, both acute and prolonged, lead to certain adverse effects that, depending on an individual's level of preparedness, deprive her/him of the ability to live a full life.

Poverty in the West Bank and Gaza Strip (WBGs) takes on many forms and on different levels reaches each and every Palestinian. The Israeli occupation, which makes its presence felt through both a prolonged conflict and occasional and often severe shocks, has been the primary cause of poverty and has had crippling effects on many levels with different reach.

Some of the main causes leading to or deepening poverty in the WBGs are mapped out in a matrix provided as Appendix I. The causes are organized according to reach and form and include ones that uniquely emerge as result of the Israeli occupation as well as others that share similarities with causes leading to poverty in other parts of the world. While not all causes are directly related to the Israeli occupation, most effects are either directly or indirectly magnified by its presence.

Some causes are unique to the condition of certain individuals and therefore have limited reach. Examples of such causes are orphanhood, old age and widowhood. Other causes can have a broader reach and exert adverse effect on the national level. Examples of such causes are forced isolation, dedevelopment¹ and oppression. Although adverse the effects of these causes extend a national reach, the level of deprivation that they inflict depends, as was mentioned before, on the individual's level of preparedness. The reach of causes is categorized as follows:

- ❖ *National reach*, where each Palestinian faces the same set of causes of poverty, irrespective of her/his demographics.
- ❖ *Governorate reach*, where different governorates face different sets of causes of poverty. For example, the current Israeli siege of the Gaza Strip is exerting there a number of causes of poverty that are not present, at least not to the same extent, in the West Bank.
- ❖ *Community reach*, where different communities face different sets of causes of poverty. For example, most refugees face a different set of causes of poverty than most non-refugees.

¹ Dedevelopment is a term used by a US economist, Sara Roy, to describe Israeli policies in the Gaza Strip that are aimed at preventing development.

- ✧ *Household reach*, where different households face different sets of causes of poverty. For example, female-headed households face a different set of causes of poverty than male headed households.
- ✧ *Individual reach*, where different individuals face different sets of causes of poverty. For example, most divorced women, orphans and drug addicts face different sets of causes of poverty than most individuals who do not fall under those categories.

The form of causes is categorized as follows:

- ✧ *Economic form* makes exchange of goods and services more difficult and undermines securitization of assets.
- ✧ *Environmental form* damages the environment.
- ✧ *Health form* increases the likelihood of bodily and psychological harm.
- ✧ *Natural form* increases the chance of loss of assets.
- ✧ *Political form* increases political uncertainty.
- ✧ *Social form* undermines social cohesion.

Some of the main effects from causes of poverty are mapped out in a matrix provided as Appendix II. The matrix offers insight into the breadth of adverse effects and provides them also, as with causes, according to form and reach. In summary, the presence of a cause of poverty, be it acute or prolonged, exerts different adverse economic, environmental, health, natural, political and social effects upon the national, governorate, community, household and individual levels.

For example, an aspect of the Israeli occupation and a cause of poverty is forced isolation. Isolation, which is imposed by Israel through its control over Palestinian borders, air and most of the occupied territory disconnects most Palestinians living in the WBGS from the rest of the world as well as, in many cases, from one another. One of the adverse effects of isolation is the difficulty to access resources and trade goods (food, materials, etc.) and services (education, healthcare, etc.), depriving Palestinians on a national level of their basic human rights as defined in Articles 22 and 25 of United Nations' universal declaration (see page 2 of this paper).

1.1.2 Capability Deprivation

The adverse effects lead to deprivations of human capability in that they hinder an individual's ability to do or be something (Sen, 1999).² Deprivation of capability, in turn, limits an individual's functionings, which is her/his achievement of doing or being something (Sen 1985; cited in Clark, 2006). In the words of Clark (2007, pp. 4): "A functioning therefore refers to the use a person makes of the commodities at his or her command." Although functionings describe what the individual actually does or is, they may be biased by her/his preferences that have adapted to or have been shaped by straitened circumstances or unjust background conditions (Clark, 2007; Nussbaum, 2003). Therefore, it is deprivation in capability that matters.

This deprivation of capability is poverty. The term poverty may be used in reference to deprivation of any one of the particular capabilities or generally on the aggregate level to an entire set of incapacities faced by an individual. Therefore, formally, poverty is deprivation in one or more capabilities (Sen, 1999). Deprivations include the incapability to have good health, move freely from place to place, be secure against violent assault, have the social bases of self-respect and non-humiliation, and have control over one's material and political environment. These deprivations are selected from a list endorsed by Nussbaum (2003). The complete list is provided as Appendix III.

² The idea of looking at poverty in the context of capability deprivation was initially developed by Amartya Sen in the late 1970s.

1.1.3 Beyond Monetary Deficiency

Viewing poverty through the lens of capability deprivation unlocks the concept from the broadly accepted belief that the dominant cause of poverty is monetary deficiency. This permits for a conceptualization of poverty that reflects its multidimensional nature, while appropriately treating monetary deficiency in the context of its instrumental significance (Sen, 1999), which is often and particularly in the Palestinian context inadequate.

Many of the deprivations resulting from the adverse effects of causes of poverty (provided in Appendix II) cannot be relieved through monetary means. Although in some countries income and capability deprivation have significant correlational linkages (Sen, 1999), in the WBGS an individual experiences many forms of deprivation irrespective of her/his income level. For example, in most cases, money can do little to relieve deprivations of various forms that stem from, for example, Israeli imposed restrictions on mobility. Even food insecurity in the WBGS is more often an issue of forced isolation than monetary deficiency (cite).

Furthermore, individuals differ in their ability to convert resources as well as in the amount and type of resources they need in order to achieve similar goals (Sen, 1990; cited in Clark, 2006). For example, moving around for an individual with a disability is likely to require additional resources such as a wheel chair or a ramp to achieve certain goals than for an individual without the disability (Clark, 2006).

1.1.4 Differences in Poverty

A focus on capability deprivation can also help in understanding differences in poverty as each poverty type is characterized by a unique set of capability deprivations. For example, the composition of poverty can differ significantly between rural and urban areas, with the terms rural poverty and urban poverty implying different sets and levels of capability deprivations. Similarly, temporary poverty differs from structural (a.k.a. chronic or sustained) poverty that is perpetuated by persisting deprivations (Ray, 1998).

1.1.5 Depth of Poverty

As poverty varies in breadth, it varies in depth. Which capability is deprived and to what degree plays a role in determining the severity of poverty and the chances of the condition of poverty being overcome.

1.2 Measurement

Measuring poverty is a difficult endeavor and most attempts fall short of capturing poverty's full scope. Despite this, attempts to measure poverty or its aspect are a necessary step in poverty alleviation and prevention.

McGee and Brock (2001) made an extensive literature review and identified a number of dichotomies (provided in Appendix IV) related to measuring poverty. For example, some approaches measure what is referred to as absolute poverty, which measures poverty according to a predefined standard that is independent of time, place or changes in distribution of resources. Other approaches measure what is referred to as relative poverty, which measures poverty against a norm within a particular population context, i.e. presence and distribution of resources. Another dichotomy exists in the treatment of poverty as a subjective or objective condition, with subjective poverty categorizing individuals as being poor according to their own perception of their condition.

1.2.1 Current Poverty Measurements in the WBGS³

In the WBGS, as in most countries, the poor are currently identified by their monetary deficiency. Most commonly utilized indicators are expenditure and income. Based on either one of the indicators, a threshold known as the poverty line is set that represents the minimally necessary level of expenditure (or income) for an adequate participation in economic life (Ray, 1998). People below this threshold are considered as being poor.

In the WBGS, the poverty line was developed by the Palestinian Central Bureau of Statistics (PCBS) in 1998 and defined in its Poverty Report of that year. When developing the methodology, the PCBS focused on defining the Palestinian standard of living by measuring household's minimal monetary needs. The PCBS chose to focus on expenditure, as opposed to income, as an indicator of the standard of living. Income was not used due to the poor quality of available income data as well as the assumption that expenditure is a better proxy for consumption. Total expenditures are adjusted to consider only selected items.

Since the establishment of its methodology in 1998, PCBS narrowly defines poverty in terms of what it finds as being most important – monetary deficiency. PCBS's measurement of poverty combines absolute and relative features. PCBS first constructs the poverty line for a reference household utilizing actual spending patterns. It then adjusts it to reflect specific conditions of other households with different characteristics.

PCBS uses the household as the unit for its analysis, based on an assumption that most Palestinian households constitute a consumption sharing unit. The reference household size is based on 1997 census data and consists of six members: two adults and four children. The PCBS has identified broad groups of necessary items to be included in the basic and expanded basket (the contents of which is provided as Appendix V). In order to capture actual household spending patterns for the goods in the basket, PCBS uses the Palestinian Household Expenditure and Consumption Survey (PECS). Based on PECS data, two poverty lines are developed:

1. *The Deep Poverty Line* is based on the basic basket, which includes necessities for survival, such as food, clothing, and housing.
2. *The Poverty Line* is based on the expanded basket, which, in addition to the items in the basic basket, includes necessities for minimally adequate living standards, such as health care, education, personal care, transportation, utensils, bedding and housekeeping supplies.

The PCBS uses 1997 as the base year for its poverty line measurement. It also selected the 30th percentile as the cutoff that separates the poor households from the nonpoor. The PCBS also adjusts for some demographic characteristics. It takes the developed budget for a reference household based on the baskets and uses an equivalence scale to adjust expenditure values for varying demographic characteristics such as number of children and/or adults in the household. PCBS's adjustments are based on estimates of economies of scale collected in PECS. PCBS does not adjust for geographic differences because of lack of data on differences in price levels across, for example, governorates.

PCBS also calculates the following measurements:

- ✧ *The Head Count* calculates the number of people below the poverty line.
- ✧ *The Head Count Index or Ratio* gives the percentage of the population in poverty by dividing the number of individuals below the poverty line by the total population under consideration.
- ✧ *Poverty Gap Index or Ratio* gives the percentage by which the average income of the poor is below the poverty line.

³ This subsection relies extensively on PCBS, 1998.

- ✧ *Poverty Severity Index* gives the mean of the squared consumption deficits. Since this index is sensitive to the distribution of income below the poverty line, it can be used to compute the amount of transfer needed to bring the poor up to the poverty line.

1.2.2 Issues with Current Poverty Measurements in the WBGs

It is important to keep in mind that the currently used terminology (e.g. the poverty lines, head count, etc.) only identify monetary deficiency. As mentioned before, monetary deficiency does not fully grasp the multidimensional nature of poverty and should be viewed only in the context of its instrumental and, especially in the Palestinian context, often inadequate significance. For example, consider a household with an ill member who requires extensive care and expensive medicines. *Ceteris paribus*, this household is likely to have much less left over to spend on non-medical consumption, such as, for example, food (O'Donnell, van Doorslaer, Wagstaff and Lindelow, 2008).

There are three main issues with the use of only monetary-based measures. These issues are:

1. The exclusion of non-market goods and services from analysis through the assumption that they have no impact on an individual's wellbeing (Kuklys & Robeyns, 2004).
2. The assumption that wellbeing is solely determined by the individual's level of income and not the level of available resources or her/his capacity to convert available resources into functionings (Kuklys & Robeyns, 2004).
3. The assumption that wellbeing is derived from the range of choices and not also the possibility to make the choice (Kuklys & Robeyns, 2004).

Developing measurement tools that better capture the form and level of an individual's incapacities (i.e. poverty) should help in better understanding poverty as well as improving the social protection sector's ability to identify the poor. Identifying the poor based on individual's incapability instead of monetary deficiency should re-categorize many of those who lack money but are, for example, self-sufficient in food production and many of those who have money but are poorly off. Simultaneously, the identification of the poor by individual's incapability should improve the targeting of assistance, with modality of assistance matching unique incapacities.

Developing capability-based measurement tools requires collecting statistics that the prevalent expenditure-focused approach often tends to ignore. Examples of well-known attempts at measuring poverty beyond monetary deficiency are the United Nations Human Development Reports (that have been published annually since 1990), the Human Development Index (HDI) and the Human Poverty Index (HPI). The HPI, for example, is a composite index that measures the level of aggregate deprivation in a country by focusing on three dimensions: 1) *Survival*, which is measured by the probability of not surviving to a certain age; 2) *Knowledge*, which is measured by the percentage of adults who are illiterate; and 3) *Decent standard of living*, which is measured by the GDP per capita in purchasing power parity US dollars. While well-known, however, the above mentioned examples fall short of coming even close to capturing the extent of deprivation in central human capabilities as, for example, the ones endorsed by Nussbaum (2003) (and provided in Appendix III).

2. Vulnerability: Concept & Measurement

A concept closely related to poverty is vulnerability. Attempting to understand and measure vulnerability is an essential component of developing a comprehensive poverty -alleviation and -prevention strategy.

Subsection 2.1 introduces the concept of vulnerability, while 2.2 considers the various ways of measuring it.

2.1 Concept

In accordance with the definition of poverty provided in Section 1, vulnerability is risk of further poverty, i.e. deprivation in one or more capabilities. Moreover, being vulnerable is in itself a deprivation in capability. Vulnerability can be viewed in the context of becoming poorer as well as in the context of becoming poor.

Below is a categorization of those who are vulnerable:⁴

1. Those living in poverty.
With their existing state of poverty weakening their ability to deal with adverse effects (provided in Appendix II), the individuals in this category are the least prepared and therefore are often the most vulnerable, having minimal control over the potential furthering in their capability deprivation. The last three categories include:
2. Those at risk of further deprivation in one or more capabilities as result of a recognized trend. A recognized trend is, for example, old age.
3. Those at risk of further deprivation in one or more capabilities as result of predictable or cyclical events. A predictable or cyclical event is, for example, seasonal work or, in this case, unemployment.
4. Those at risk of further deprivation in one or more capabilities as result of unpredictable events. Examples of unpredictable events are harvest failures or escalations of the conflict.

The risk of further deprivation in one or more capabilities and, in turn, the likelihood of these individuals becoming poor or poorer depends on their ability to deal with adverse effects.

As in the case of poverty, the Israeli occupation is a primary catalyst of vulnerability, extending various reach on the national, governorate, community, household and individual levels. Two main forms of vulnerability (Darcy, 2004) that are present in the WBGS stem from the Israeli occupation. One is related to acute shocks, which, in the form of violent conflict and in addition to the actual violence, have lead to mass displacement, loss of assets and overall disruption of Palestinian life. The other is related to prolonged crisis, characterized by chronic food insecurity, high mortality and morbidity, disruption of education and health services, unsustainable survival strategies and dependency on external assistance.

The level of vulnerability, however, is not only dependent on the duration, form, frequency, likelihood and magnitude of adverse effects (provided in Appendix II), but also on the individual's, household's, community's, governorate's and nation's level of preparedness.

Preparedness reflects the availability of resources that may be utilized to minimize the deprivation of capabilities. According to Dercon (2001), these resources include human (labor, health, education, knowledge, etc.), physical (equipment, land, technology, water, etc.), public (services, land, water, infrastructure, etc.) and social (institutions, markets, norms, relationships, rules, etc.) capital. Preparedness also reflects the actions taken related to the activity of building up human,

⁴ Categories are adapted from Dercon, 2001.

physical, public and social capital in effort to withstand the influence of adverse effects. Lastly, preparedness reflects the ability to take advantage of opportunities that prevent the furthering of capability deprivation.

2.2 Measurement

Measuring vulnerability is different from measuring poverty as it deals with estimating ex-ante risk, instead of documenting an ex-post state. This difference, in turn, implies that modeling efforts need to be intertemporal, with available options and potential outcomes being considered (Dercon, 2001). Vulnerability may be measured by the expected ability or inability to cope with adverse effects (as provided in Appendix II), be they acute or prolonged shocks or stresses.

One approach to measuring vulnerability involves identifying vulnerability indicators and accordingly developing vulnerability profiles for individuals, households, communities and other groupings. Once profiles have been created, they may be categorized in the following way:⁵

- ✧ *High level of vulnerability.* Those who face more than a 50 percent probability of furthering their capability deprivation.
- ✧ *Medium level of vulnerability.* Those who face a 23 to 50 percent probability of furthering their capability deprivation.
- ✧ *Low level of vulnerability.* Those who face less than a 22 percent probability of furthering their capability deprivation.

Identifying vulnerability indicators requires forward-looking information and assumptions about possible states and outcomes.⁶ Models of future outcomes can be developed using predicted mean functionings and its volatility. Assumptions about the likelihood of shocks, evolution of shocks over time, and the household's ability to cope with these shocks; as well as the diversity of potential shocks and events and the different levels of resilience of the household need to be made. Measurement of vulnerability should always be done in relation to a benchmark.

Most commonly, cross-sectional data is used for the above-described analysis. However, panel-data which provides actual observations of household coping capabilities is preferred. The above measurement of vulnerability mainly deals with the head count and the extent of vulnerability, but ignores the depth of poverty that particular households are vulnerable to. To capture this, measures of depth of poverty may be based on, for example, the poverty gap ratio. This can be done by calculating the poverty gap for each state of the world.

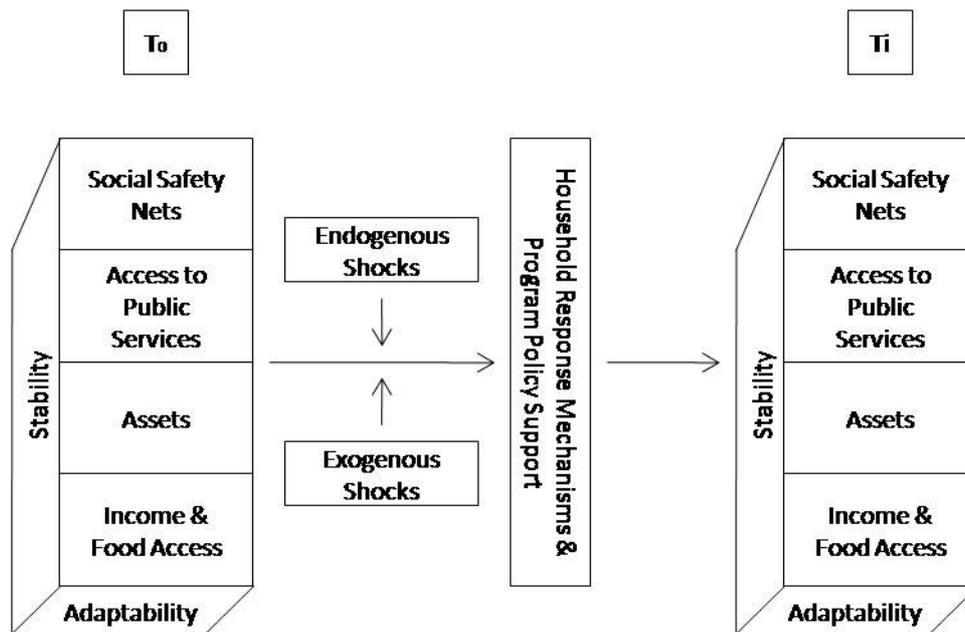
Another approach is to focus on the household's ability to withstand adverse effects (Adger, 2000), instead of, as in the case with vulnerability, its inability to do so.⁷ Progress has been made with this approach in relation to assessing the resilience of a household's food security system to adverse effects (Alinovi, Mane & Romano, 2008). The methodology requires data on the formal safety nets, functioning of markets, economic policies and a household's assets (physical, human and social capital), which all determine the opportunities a household faces, as well as activities it can pursue in order to avert capability deprivation.

The methodology is aimed at assessing a household's level of stability and adaptability. The conceptual framework for measuring resilience is provided below:

⁵ Adapted from Chaudhuri et al., 2001, which is cited in Dercon, 2001.

⁶ This paragraph relies entirely on Dercon, 2001.

⁷ This and the next paragraphs rely entirely on Alinovi, Mane & Romano, 2008.



The framework depicts a household's state before and after a shock (or any acute or prolonged adverse effect). Time nod (T_0) represents the pre-shock condition of the household's response mechanism, which is based on its access to assets, income-generating activities, public services and social safety nets. During an adverse shock, be it endogenous or exogenous, the household relies on available response mechanisms, absorption and adaptive capacities, and policy support from decision makers (e.g. government, international institutions, etc.), which may actually be themselves the causes of the adverse effects. Time i (T_i) depicts the post-shock condition of the household's response mechanism. The quicker the household's ability to return to the pre-shock or better condition, the more resilient (i.e. stable and adaptable) its food security system is.

3. Social Protection: Concept & Application

Alleviating and preventing poverty and vulnerability requires a well organized and comprehensive approach. The approach should not only respond to adverse economic, environmental, health, natural, political and social effects, but also work toward eradicating their causes. The approach should take into account the need to simultaneously engage with different measures on the national, governorate, community, household and individual levels.

Subsection 3.1 describes what social protection is, while subsection 3.2 considers its application.

3.1 Concept

There appears to be a noticeable shift toward acknowledging the value, if not the necessity, of the broader interpretation of social protection in any sustainable poverty -alleviation and -prevention effort (Devereux & Sabates-Wheeler, 2004). There is an emerging consensus that social protection must go beyond economic protection and encompass its broader social component (Devereux & Sabates-Wheeler, 2004).

It is increasingly and convincingly argued that social protection directly and indirectly contributes to economic development, that it can be affordable, and that it must include consideration for social equity, empowerment and rights. In terms of rights, for example, a rights-based approach (Piron, 2004) was developed to social protection, which treats social protection as an entitlement and not just charity. Beneficiaries are viewed as 'rights-holders' making legitimate claims, while states are seen as obliged to respect, protect and fulfill the rights of its citizens, as well as non-citizens. Piron (2004) emphasized that social security is a human right and that policy development and programming must promote civil and political rights in its support.

Furthermore, credible challenges have been made to the notions that social protection depends only on public action, excluding private and informal providers, that its focus must be only on the poor and not those who are vulnerable to becoming poor, and that social protection excludes major social risks, such as child labor, domestic violence, armed conflict and discrimination.⁸ Similarly, the common treatment of risk as an exogenous cause is challenged. In addition to dealing with the consequences of risk, it is now increasingly argued that social protection must include a transformative element that minimizes the risk itself.

This conceptualization forces social protection efforts out of the monetary-deficiency framework and increasingly redirects attention toward the causes of poverty. In summary, social protection is the process of promoting and maintaining a dynamic, cohesive and stable poverty- and vulnerability- free society through increased equity and security.⁹

3.2 Application

Action must be taken on a number of levels in order to achieve the multifaceted objectives (Bonilla Garcia & Gruat, 2003) set out above in the definition of social protection. The International Labor Organization (ILO) developed a framework that categorizes social protection initiatives by their *protective*, *preventive*, and *promotive* measures. Devereux & Sabates-Wheeler (2004) have added a fourth measure to the ILO framework called *transformative*, which deals more directly with the causes of poverty and vulnerability than the other measures. The following is a description of each type of measure constructing the social protection framework.

⁸ This paragraph relies extensively on Devereux & Sabates-Wheeler, 2004.

⁹ Adapted from Norton, Conway and Foster, 2001.

3.2.1 Protective Measures

Protective measures aim to alleviate capability deprivation, i.e. poverty, by providing appropriate goods and services (Bonilla Garcia & Gruat, 2003). Protective measures in the WBGS include formal and informal cash and in-kind assistance (food, health care, education, protection for women, and care for the disabled, elderly, children, juveniles and school dropouts), as well as employment generating schemes. They are mainly provided by governmental institutions and international and non-government organizations.

Darcy (2004) emphasizes the vital importance of protective measures during and in the aftermath of crises such as adverse macroeconomic shocks, natural hazards and, particularly, violent conflicts. He points out that such catastrophic events that further erode often already-marginal livelihoods are for some (as is the case of the WBGS) a recurring reality of life. Darcy argues that in such contexts, loss of income is only one of many causes that undermine human security. In his view (2004, pp. 2), "[h]uman security demands a concept of protection that encompasses threats of violence and persecution, coercion and deliberate deprivation, as well as protection against loss of entitlement and economic vicissitudes."

Taking into account some of the main deprivations in the Palestinian context, protective measures should aim to alleviate deprivation in ones' capability to have good health, move freely from place to place, be secure against violent assault, have the social bases of self-respect and non-humiliation, and have control over one's material and political environment.

While essential, protective measures need not be prerequisite to other measures. For example, transformative measures that help to remove causes that lead to capability deprivation may play a more impactful role.

3.2.2 Preventive Measures

Preventive measures, be they contributory or noncontributory, aim to avert capability deprivation (Devereux & Sabates-Wheeler, 2004) by helping the vulnerable prepare to deal with predictable and unpredictable adverse effects. Preventive measures in the WBGS include insurance and strategies (will expand upon). Successful protective measures may also be seen as preventive, as they contribute to helping avert further deprivation of capabilities.

Darcy (2004) points out that conflict carries with it risks that stretch far beyond economic insecurity, and that these risks need to be addressed particularly because the level of exposure to them is greatly related to the individual's extent of poverty and marginalization. A conflict, Darcy argued, has both short- and long- term impoverishing effects - directly by disrupting the daily life and indirectly by disrupting that what makes life sustainable and even possible. He raises the issue of loss of social capital, and cites Colletta & Cullen (2000:4) who question whether social and economic development is even possible in the absence of social cohesion. As an example, Darcy cites Fukuyama (1995) who identifies trust as key in social cohesion, something commonly lacking during and in the aftermath of a conflict.

Holzmann and Jorgensen (1999) identified three preventive strategies that can be taken to mitigate ex-ante income risk. They are portfolio diversification, hedging and insurance.

3.2.3 Promotive measures

Promotive measures aim to strengthen capabilities to help the poor emerge from poverty. Measures in the WBGS include a range of livelihood-enhancing programs, such as micro -finance and -credit, skill development, and training and re-training for both adults and the youth. Successful preventive measures could also be seen as being promotive, since reduction of risk enables individuals to take advantage of opportunities they otherwise would not take advantage of

(Devereux & Sabates-Wheeler, 2004). The same may be said about protective measures such as education or public works projects that while offering essential assistance are also building capability.

3.2.4 Transformative measures

Transformative measures aim to promote social inclusion while working against inequality, oppression and discrimination through actions that support the development and implementation of legislation, policies and programs.

Since the establishment of the PNA in 1994, many transformative measures have been taken to protect the rights of various vulnerable groups in the WBGS. For example, the introduction of Palestinian Labor Law in 2000 aimed to ensure for all laborers the right to justice, health care and organization. Other transformative measures have been taken by the PNA to provide security for vulnerable groups such as children, the disabled, farmers, and households with imprisoned household heads.

The above mentioned transformative measures are all necessary for building social equity within the Palestinian society. At the same time, they all fall short of confronting the main sources of insecurity in the WBGS. In the Palestinian context, all Palestinians need to be viewed as members of a vulnerable group who daily confront the risks related to living under the Israeli occupation. Therefore, most-relevant transformative measures would be the ones challenging the current political status quo, aimed at reversing the main capability deprivations prevalent in the WBGS.

Transformative measures that aim to end the Israeli occupation or, in the mean time, address fundamental human rights issues need to be at the forefront of any sustainable social protection effort in the WBGS. Otherwise is ignoring the root causes of Palestinian social and economic insecurity and failing to assure that the social protection efforts have positive long-term effects.

Appendix I: Matrix of Causes of Poverty

Cause	National	Governorate	Community	Household	Individual
Economic	<ul style="list-style-type: none"> - adverse macro changes - dedevelopment - displacement - forced isolation 	<ul style="list-style-type: none"> - forced isolation - theft of resources 	<ul style="list-style-type: none"> - forced isolation - discrimination - displacement - theft of resources 	<ul style="list-style-type: none"> - absence of male head of household - displacement - loss of assets - large family size 	<ul style="list-style-type: none"> - low level of education - orphanhood
Environmental	n/a	n/a	<ul style="list-style-type: none"> - pollution 	n/a	n/a
Health	<ul style="list-style-type: none"> - lack of resources - violent conflict - forced isolation - psychological pressure stemming from the military occupation 	<ul style="list-style-type: none"> - theft of resources 	<ul style="list-style-type: none"> - psychological pressure stemming from the military occupation 	<ul style="list-style-type: none"> - psychological pressure stemming from the military occupation 	<ul style="list-style-type: none"> - psychological pressure stemming from the military occupation - old age - disability - drug addiction - illness or injury
Natural	<ul style="list-style-type: none"> - drought - earthquake - harvest failure 	<ul style="list-style-type: none"> - drought - theft of resources 	n/a	n/a	n/a
Political	<ul style="list-style-type: none"> - oppression - forced isolation 	<ul style="list-style-type: none"> - forced isolation 	n/a	n/a	n/a
Social	<ul style="list-style-type: none"> - forced isolation 	n/a	<ul style="list-style-type: none"> - discrimination 		<ul style="list-style-type: none"> - gender - orphanhood - divorce - widowhood

Source: The framework is adapted from the World Development Report 2000/01, which adapts its version from Sinha and Lipton (1999) and World Bank (2000q); the examples of causes are part of this paper with several based on Hilal, 2002, and ; the examples of causes have not been statistically verified and at this point only serve as support for the conceptualization of poverty in the WBGS.

Appendix II: Matrix of Effects of Causes of Poverty

Adverse Effect	National	Governorate	Community	Household	Individual
Economic	<ul style="list-style-type: none"> - instability - insecurity - lack of opportunities - lack of control - poor infrastructure - unemployment - lack of resources - lack of access 		<ul style="list-style-type: none"> - lack of resources - lack of access 	<ul style="list-style-type: none"> - dependence on charity from informal networks and religious groups 	n/a
Environmental	n/a	- pollution	- pollution	n/a	n/a
Health	<ul style="list-style-type: none"> - higher risk of bodily harm - lack of access to resources - psychological stress from causes related to the occupation 	n/a	<ul style="list-style-type: none"> - higher risk of bodily harm - lack of public services - psychological stress from causes related to the occupation 	<ul style="list-style-type: none"> - psychological stress from causes related to the occupation 	<ul style="list-style-type: none"> - higher risk of bodily harm - psychological stress from causes related to the occupation - psychological stress from causes unrelated to the occupation
Natural	<ul style="list-style-type: none"> - loss of assets - higher risk of bodily harm 	n/a	<ul style="list-style-type: none"> - loss of assets - bodily harm 	n/a	n/a
Political	<ul style="list-style-type: none"> - insecurity - instability - disempowering institutions - precarious livelihoods - abuse by those in power 	n/a	<ul style="list-style-type: none"> - abuse by those in power 	n/a	<ul style="list-style-type: none"> - abuse by those in power
Social	<ul style="list-style-type: none"> - exclusion 	n/a	n/a	<ul style="list-style-type: none"> - relationship problems - social exclusion 	<ul style="list-style-type: none"> - disempowering institutions - relationship problems - exclusion

Source: The framework is adapted from the World Development Report 2000/01, which adapts its version from Sinha and Lipton (1999) and World Bank (2000q); the examples of effects are part of this paper with several based on Hilal, 2002 and ; the examples of effects have not been statistically verified and at this point only serve as support for the conceptualization of poverty in the WBGs.

Appendix III: An Example of Central Human Capabilities

Capability	Description
<i>Life</i>	Being able to live to the end of a human life of normal length; not dying prematurely, or before one's life is so reduced as to be not worth living.
<i>Bodily Health</i>	Being able to have good health, including reproductive health; to be adequately nourished; to have adequate shelter.
<i>Bodily Integrity</i>	Being able to move freely from place to place; to be secure against violent assault, including sexual assault and domestic violence; having opportunities for sexual satisfaction and for choice in matters of reproduction.
<i>Senses, Imagination, and Thought</i>	Being able to use the senses, to imagine, think, and reason -- and to do these things in a "truly human" way, a way informed and cultivated by an adequate education, including, but by no means limited to, literacy and basic mathematical and scientific training. Being able to use imagination and thought in connection with experiencing and producing works and events of one's own choice, religious, literary, musical, and so forth. Being able to use one's mind in ways protected by guarantees of freedom of expression with respect to both political and artistic speech, and freedom of religious exercise. Being able to have pleasurable experiences and to avoid non-beneficial pain.
<i>Emotions</i>	Being able to have attachments to things and people outside ourselves; to love those who love and care for us, to grieve at their absence; in general, to love, to grieve, to experience longing, gratitude, and justified anger. Not having one's emotional development blighted by fear and anxiety. (Supporting this capability means supporting forms of human association that can be shown to be crucial in their development.)
<i>Practical Reason</i>	Being able to form a conception of the good and to engage in critical reflection about the planning of one's life. (This entails protection for the liberty of conscience and religious observance.)
<i>Affiliation</i>	<p>a. Being able to live with and toward others, to recognize and show concern for other human beings, to engage in various forms of social interaction; to be able to imagine the situation of another. (Protecting this capability means protecting institutions that constitute and nourish such forms of affiliation, and also protecting the freedom of assembly and political speech.)</p> <p>b. Having the social bases of self-respect and non-humiliation; being able to be treated as a dignified being whose worth is equal to that of others. This entails provisions of non-discrimination on the basis of race, sex, sexual orientation, ethnicity, caste, religion, national origin.</p>
<i>Other Species</i>	Being able to live with concern for and in relation to animals, plants, and the world of nature.
<i>Play</i>	Being able to laugh, to play, to enjoy recreational activities.
<i>Control over one's Environment.</i>	<p>a. <i>Political.</i> Being able to participated effectively in political choices that govern one's life; having the right of political participation, protections of free speech and association.</p> <p>b. <i>Material.</i> Being able to hold property (both land and movable goods), and having property rights on an equal basis with others; having the right to seek employment on an equal basis with others; having the freedom from unwarranted search and seizure. In work, being able to work as a human being, exercising practical reason and entering into meaningful relationships of mutual recognition with other workers.</p>

Source: Direct quotation from Nussbaum, 2003, with minor changes in formatting.

Appendix IV: Dichotomies Related to Poverty Research

Dichotomy	Discussion
<i>Approaches to measuring poverty</i>	
<i>One-dimensional vs. Multidimensional</i>	The one-dimensional conceptualization interprets and measures poverty using one variable, such as, for example, low income. This approach is based on the assumption that one's level of income can determine whether or not and to what extent one is poor. This approach is criticized for missing the full scope of poverty. On the other hand, the multidimensional conceptualization interprets and measures poverty using a broader set of variables. While potentially more precise, selecting the right variables and collecting data on them on a mass level tends to be problematic.
<i>Objective vs. Subjective.</i>	This raises the philosophical question of whether poverty is an objective, and therefore a universal concept, or involves a subjective value judgment. For example, some surveys, instead of collecting actual income data, attempt to gauge poverty by asking the surveyed about the minimum income level they feel is necessary to satisfy basic needs.
<i>Relative vs. Absolute.</i>	Relative poverty assessment compares one group's deprived state to another's privileged state. While absolute poverty represents a level of income/consumption/expenditure that is the minimum for a household to sustain an acceptable standard of life.
<i>Dynamic vs. Static.</i>	The dynamic approach distinguishes between temporary and chronic poverty, while the static approach does not.
<i>Methods for assessing poverty</i>	
<i>Direct vs. Indirect</i>	Is the approach direct, in that it measures the satisfaction of needs, or indirect, by measuring the potential to satisfy them?
<i>Identificatory vs. Aggregative</i>	Does the method identify who the poor are or aggregate their number?
<i>Economistic vs. Non-economistic</i>	Does the method use samples of the population to make predictions and statistical inferences on the population or not?
<i>Extractive vs. Empowering</i>	Does the researcher collect data for it to be analyzed somewhere else, or is it collected and provided for the researched direct benefit?
<i>Rapid vs. In-depth.</i>	Is the research attempt superficial or aimed at developing a thorough understanding?
<i>Contextual vs. Non-contextual</i>	Is the data analyzed within the local social, cultural and economic environment or not?
<i>Data used in assessing poverty</i>	
<i>Objective vs. Subjective</i>	Is the data objectively verifiable or does it carry an opinion?
<i>Micro vs. Macro</i>	Does the data capture detail on, for example, village level or does it capture, for example, nationwide trends?
<i>Quantitative vs. Qualitative</i>	Is the data expressed numerically or non-numerically? Or is it expressed in both? If a quantitative method is used, it does not need to be limited to monetary measures, since non-monetary measures such as nutrition, education and health indicators provide useful information on poverty (Dercon, 2001).

Source: The list of dichotomies is from McGee and Brock, 2001.

Appendix V: Items in the Basic and Expanded Baskets, according to PECS ID

Group #	Group Description	Item Description – ID #
<i>Basic Basket</i>		
1-10	<i>Food</i>	Includes everything except groups 11 (take away food) and 12 (own produced food)
13	<i>Clothing</i>	Includes everything – clothing, footwear and sewing materials
14	<i>Housing</i>	Option 1: 2901 (or question 15): Rent for renters. 4302: Interest on loans for homeowners. 2902-2914: Utilities and fees. Option 2: 2901 (or question 15): Rent for renters. Group 26: Imputed rent. 2902-2914: Utilities and fees.
<i>Expanded Basket</i>		
1-10, 13, 14	<i>Basic Basket</i>	Includes everything mentioned above
15	<i>Utensils & bedding</i>	Selected items: 3101-3129; 3001-3010
16	<i>Household operations (housekeeping supplies)</i>	Selected items: 3201-3220.
17	<i>Health care</i>	Includes everything: 3301-3318
21	<i>Personal care</i>	Selected items: 4001-4002; 4005-4016; 4018-4019
18	<i>Transportation</i>	3501-3503; 3505: Fares only.
19	<i>Education</i>	Includes everything: 3801-3814.

Source: PCBS, 1998.

Appendix VI: Glossary

absolute poverty – measures poverty according to a predefined standard that is independent of time, place or changes in distribution of resources.

capability – is the ability to do or be something.

causes – a cause of poverty, be it acute or prolonged, exerts different adverse economic, environmental, health, natural, political and social effects upon the national, governorate, community, household and individual levels.

functionings – achievement of doing or being something.

poverty – is deprivation in one or more capabilities. Deprivations include the incapability to have good health, move freely from place to place, be secure against violent assault, have the social bases of self-respect and non-humiliation, and have control over one's material and political environment. The term may be used in reference to deprivation of any one of the particular capabilities or generally on the aggregate level to an entire set of incapacities faced by an individual.

relative poverty – measures poverty against a norm within a particular population context, i.e. presence and distribution of resources.

resilience – is the ability to withstand adverse effects.

preventive measures – be they contributory or noncontributory, aim to avert capability deprivation by helping the vulnerable prepare to deal with predictable and unpredictable adverse effects.

promotive measures – aim to strengthen capabilities to help the poor emerge from poverty.

protective measures – aim to alleviate capability deprivation, i.e. poverty, by providing appropriate goods and services.

social protection – is the process of promoting and maintaining a dynamic, cohesive and stable poverty- and vulnerability- free society through increased equity and security.

transformative measures – aim to promote social inclusion while working against inequality, oppression and discrimination through actions that support the development and implementation of legislation, policies and programs.

vulnerability – is risk of further poverty, i.e. deprivation in one or more capabilities. Moreover, being vulnerable is in itself a deprivation in capability. Vulnerability can be viewed in the context of becoming poorer as well as in the context of becoming poor.

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