Multidimensional Well-being:
Conceptual, methodological, and analytical perspectives

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- **Aims and structure of the project**
- **Activities during first project year**
- **Some results of project work**
  - Conceptual paper
  - Methodological paper
- **Forms of collaboration**
- **Difficulties encountered**
- **Future collaboration**

AIMS AND STRUCTURE OF THE PROJECT

- **Aims of the project**
  - Providing a more coherent and more sophisticated understanding of multidimensional well-being by employing a cross-cultural and multidisciplinary perspective
  - Joint scientific research output (conference presentation, working papers, peer-reviewed articles)
- **Three research axes**
  - Conceptualizing multidimensional well-being
  - Measuring and synthesizing multidimensional well-being
  - Analyzing in more detail specific aspects of multidimensional well-being in India and Switzerland (the elderly, poverty)
- **Three institutions involved (no previous collaboration)**
  - ISEC, Bangalore (4 researchers)
  - FORS, University of Lausanne (2 researchers)
  - Sociological Institute, University of Neuchâtel (5 researchers)

- **Three joint short visits**
  - Two in Switzerland (Lausanne, Neuchâtel)
  - One in India (Bangalore)

- **Purpose of joint visits**
  - to get to know each other
  - presenting and discussion ongoing research projects of the Swiss and Indian research groups
  - Discussing and defining topics of common papers: 6-9 paper ideas have been developed
  - Drafting of the first two papers

- **Papers and articles drafted**
  - Conceptual paper on "Conceptualizing and measuring multidimensional well-being" (work in progress)
  - Methodological paper on "Exploring multidimensional well-being;" the paper compares three methodological approaches in order to synthesize multidimensional well-being. This paper has been submitted to a peer-reviewed social sciences journal (Social Indicators Research)
  - Preparatory work on papers to be drafted in 2nd project year
    - Multidimensional poverty index
    - Occupational segregation: gains and losses of gender/social groups
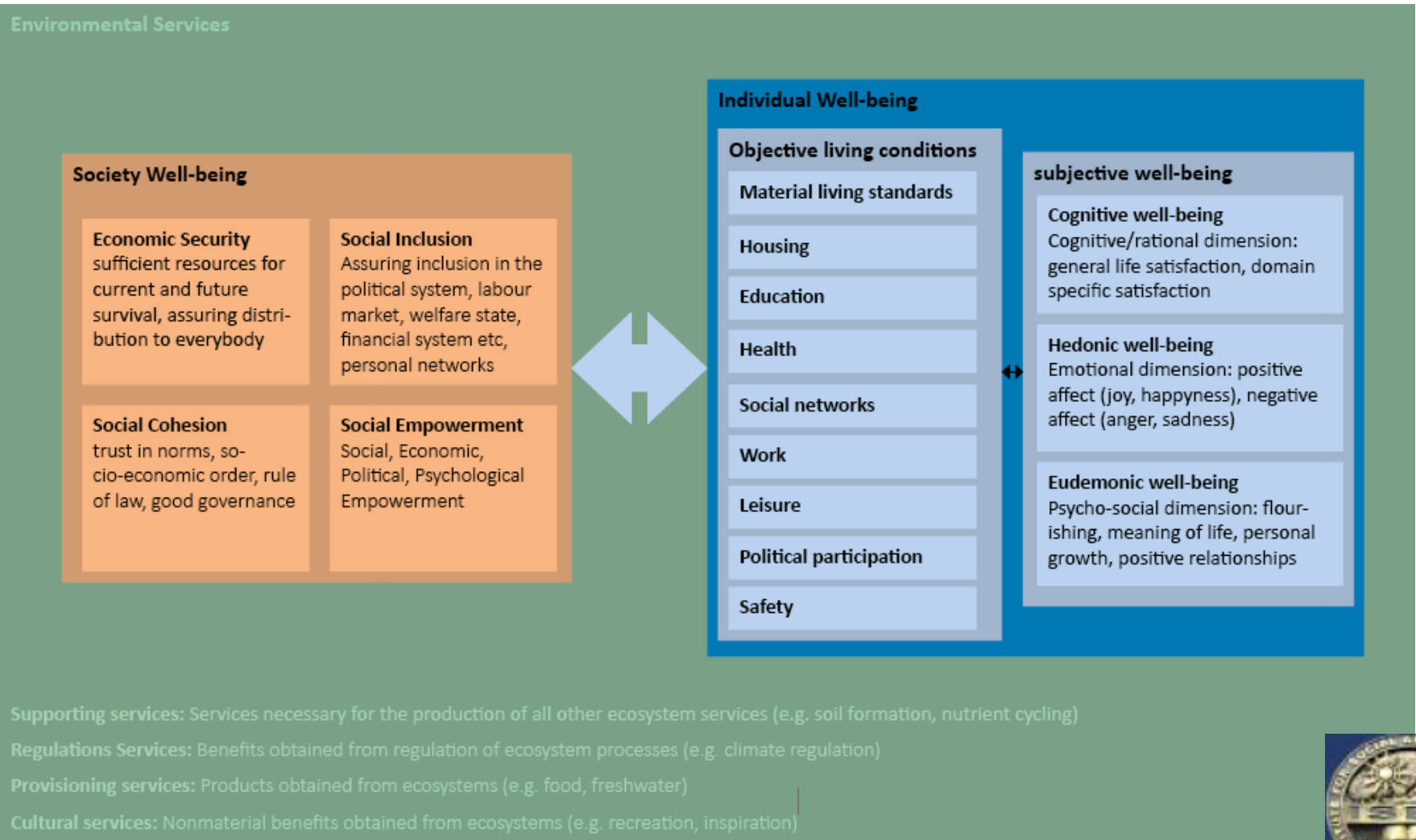   - Measuring subjective well-being among the elderly

- **Conference presentations (based on the joint methodological paper)**
  - Presentation at the conference of the International Sociological Association: 3rd ISA Forum of Sociology, Vienna 10-14 July 2016
  - Presentation at 34th general conference of the International Association of Research in Income and Wealth (IARIW), Dresden, August 21-27, 2016
- **Organization of workshops**
  - Organization of a workshop on "Indian and Swiss perspectives on well-being, poverty and inequality," June 2-3, University of Neuchâtel/Switzerland

- **Objective of the paper: how to synthesize / how to aggregate?**
  - comparison of three methodological (top-down) approaches to construct a synthetic multidimensional measure of well-being (using the same theoretical framework and one single data set), namely
    - (1) confirmatory factor analysis (CFA),
    - (2) the Alkire and Foster counting approach (AF),
    - (3) the POSET (partial order set theory) approach
- **Theoretical framework and operationalization**
  - Swiss Social Report, 1st domain: production & consumption of social goods
  - Four dimensions (and 12 indicators):
    - (1) Educational and occupational positioning: 2 indicators: Highest level of education achieved, Occupational position (CH-CSP)
    - (2) Employment situation: 3 indicators: Job security, Risk of unemployment, Satisfaction with working conditions
    - (3) Financial situation: 4 indicators: Satisfaction with financial situation, Financial situation manageable, Assessment of income and expenses, Arrears of payments
    - (4) Work-life balance: 3 indicators: Interference work/private activities, Exhausted after work, Difficult to disconnect from work

- **Data and methods**
  - Data: Swiss Household Panel, wave 2013
  - Most data is ordinal
  - Methods: CFA, AF, POSET
  - comparing different models (variation of cutoff, number of variables, selection of different indicators within the same dimension)
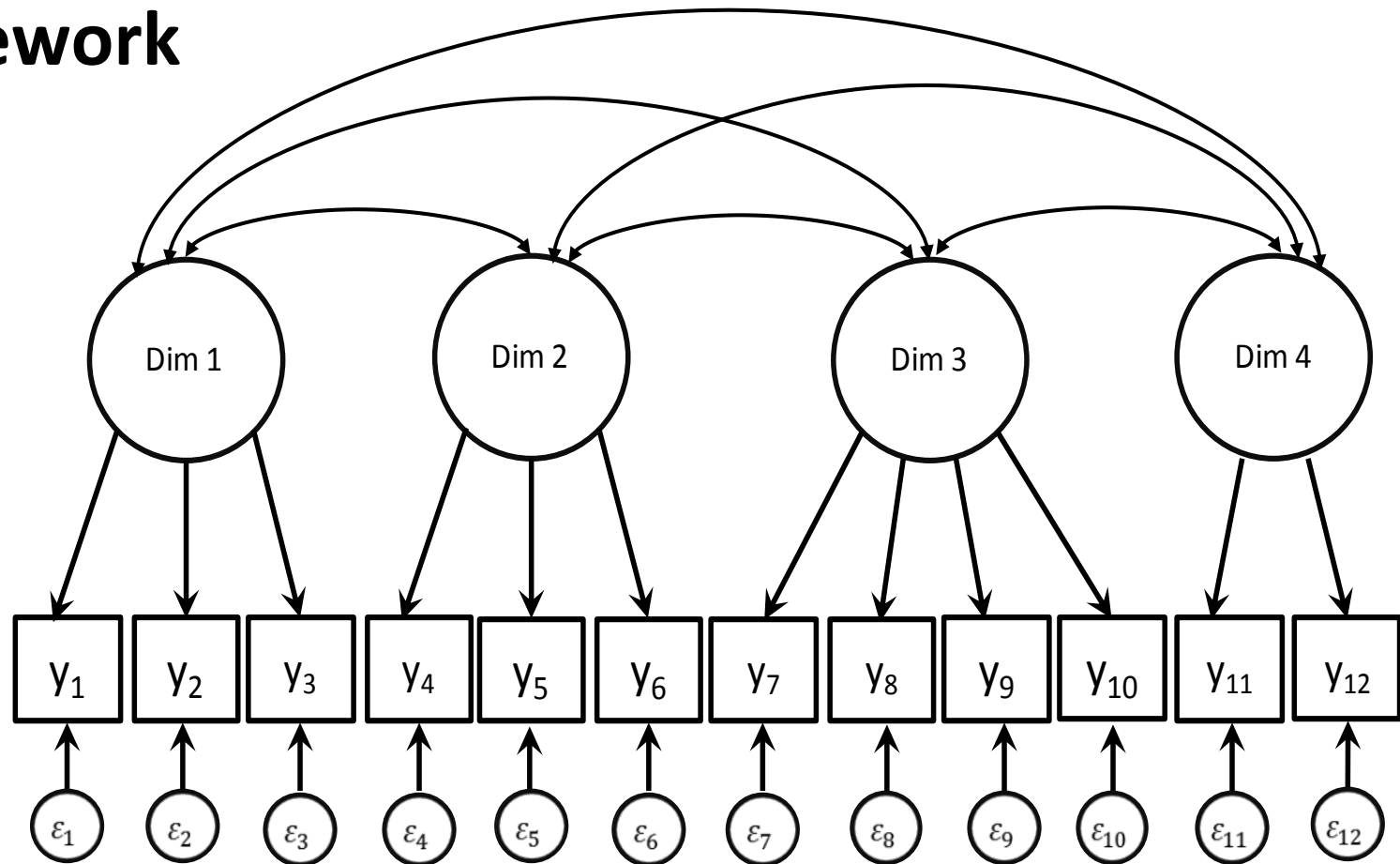
AF and POSET models tested

- ## AF: same first cutoff
  - Second cutoff of models with 12 items:
    - 4/12
    - 6/12
  - Second cutoff of models with 4 items: 2/4
    - ***Model 1****: 1) Interference work/private activities, 2) Job security, 3) Assessment of income and expenses, and 4) Educational level*
    - ***Model 2****: 1) Difficult to disconnect from work, 2) Risk of unemployment, 3) Satisfaction with financial situation, and 4) Occupational level*

- ## POSET: only models with 4 items (2/4)
  - ***Model 1****: 1) Interference work/private activities, 2) Job security, 3) Assessment of income and expenses, 4) Educational level*
  - ***Model 2****: 1) Difficult to disconnect from work, 2) Risk of unemployment, 3) Satisfaction with financial situation, 4) Occupational level*

- **CFA: Test the adequacy data-theoretical framework**

- **AF: Compute the number of deprived people in society from multidimensional perspective**
  - Dual cut-off
    - Determine 'deprived or not-deprived' within each dimension
    - Identify 'deprived' across dimensions
    - 2 scores possible:
      - Deprived
      - Not deprived

Difficult to disconnect from work
   0, 1-5, 6-10
Assessment of income and expenses
   save money, use what they earn, eat in its assess and savings or get into debts
Job security
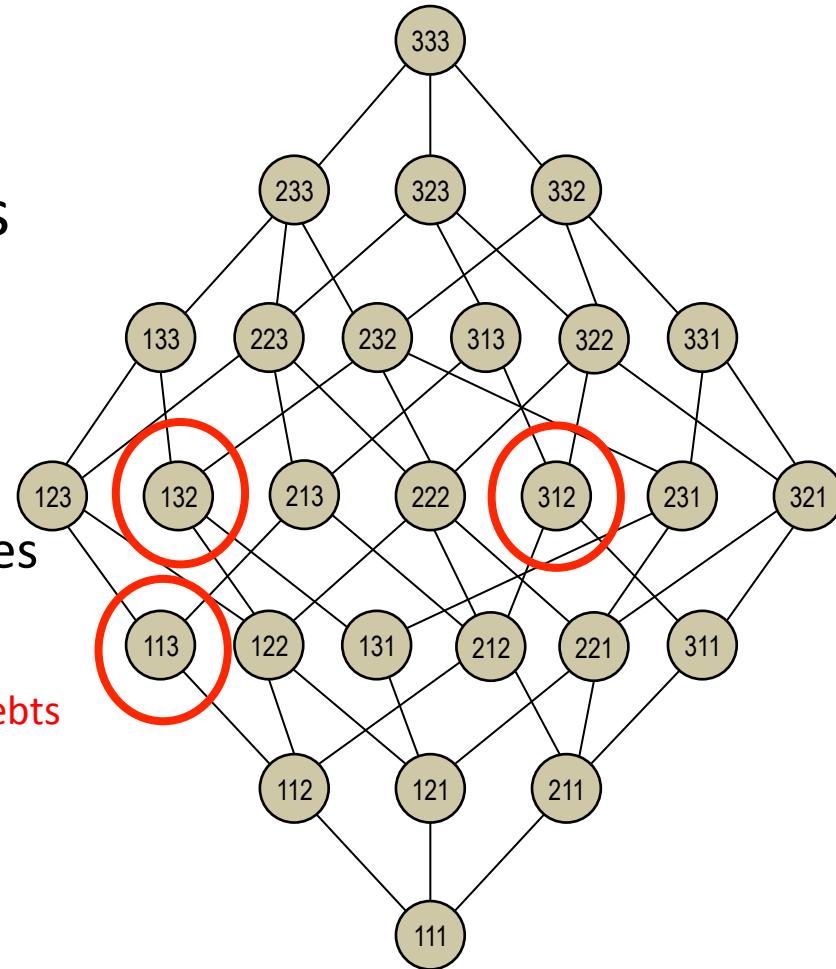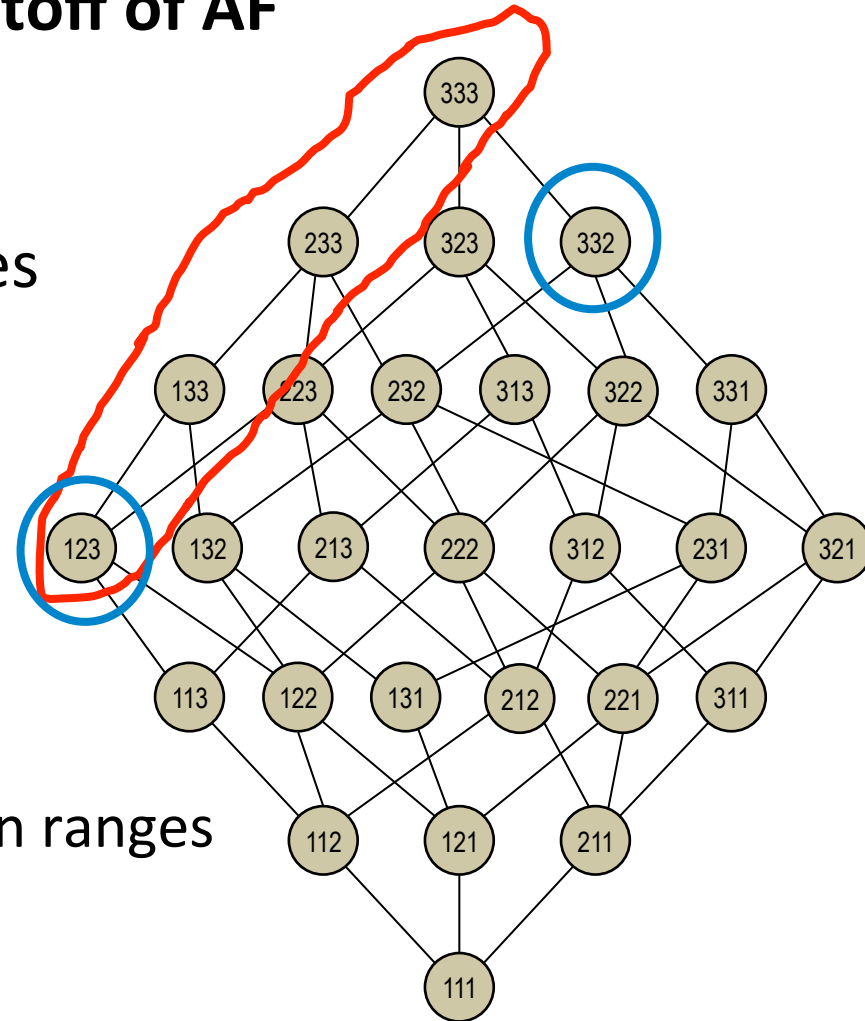   secure, almost secure, quite insecure, insecure

- **POSET: based on the dual cutoff of AF**
- No aggregation
- Each single profile =
    combination of WB scores

  - Difficult to disconnect from work
    - 3: 0
    - 2: 1-5
    - 1: 6-10
  - Assessment of income and expenses
    - 3: save money
    - 2: use what they earn
    - 1: eat in its assess and savings or get into debts
  - Job security
    - 3: secure or almost secure
    - 2: quite insecure
    - 1: insecure

- **POSET: based on the dual cutoff of AF**
- No aggregation
- Each single profile =
  combination of WB scores
- Relationship between
  two objects
  - Can be ordered
    333/233/133/123…
  - Incomparable objects
    123 and 332
  - Score of degree of deprivation ranges
    between 0 and 1

- **Main results**
  - Similar results of the three methodologies: The different synthetic indicators are highly correlated
  - Limited overlap the populations identified as deprived: the individuals and households identified as multidimensionally deprived differ within (and between) methodologies, i.e. different models do not identify the same people as deprived (impact of item selection)
  - Comparing AF and POSET shows substantial "in-between cases" of partially deprived (neither fully deprived nor well-off) of 10%-20%
  - Conclusion: Combining the three approaches

- **Conceptual paper**
  - First drafts: Two separate drafts by Swiss and Indian groups
  - Common discussion of first drafts at joint meeting
  - Integration into one single draft
  - Discussion and revision

- **Methodological paper**
  - Combining different methodological strengths and experiences of the Indian and Swiss research groups (India: experts on AF approach; Switzerland: experience in CFA, recently POSET)
  - One single data set (Swiss data, prepared by the Swiss team and sent to the Indian team)

DIFFICULTIES ENCOUNTERED

- **Difficulties linked to data availability**
  - No comparative Indo-Swiss data on well-being available
  - Access to micro data difficult (e.g. official micro data for Switzerland like the SLFS) and/or time consuming
  - Solution:
    - focus on methodological aspects (that can be treated with different data sets)
    - Use of different data sets which are not fully comparable but can be used with appropriate methods
- **Difficulties linked to financing and administration**
  - no resources available for salaries for PhD and postdocs/difficulties to link ongoing PhD research projects to joint Indo-Swiss paper projects causes delays in research work on some of our planned joint papers
  - Regarding visits: daily rates provided by the programme are rather low and not sufficient; Solution: participating institutes covered a substantial part of the costs
  - Substantial budget cut on the Indian side (communicated only after 6 months): solution: extraordinary supplementary financing of part of the reduced budget by the University of Neuchâtel
  - A lot of administrative work (as compared to SNSF projects)

- **Work on joint papers**
  - One more joint meeting (in February 2017)
  - Joint work on individual common papers probably beyond the end of the project
- **Research proposal for larger project funding**
- **Organization of a joint international conference in India - funded by a Swiss foundation (WSF)**
  - An international conference on the topic of the "Middle class in world society" will be jointly organized (the conference will take place at ISEC, Bengalore)
  - The conference will be funded by the World Society Foundation, Zurich

THANK YOU FOR YOUR ATTENTION