

The econometrics of inequality and poverty
*Lecture 9: The pitfalls of empirical work: Inequality
and Poverty in Europe*

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1 Introduction

This lecture is based mainly on the book *Poverty in Europe* written by Atkinson (1998) following his Yrjö Jahnsson lecture of 1990 and on the more recent paper by Brandolini (2007) which can be seen as a continuation of the former. Up to now we have considered survey data on income, corresponding to a particular country, taking examples in France and in the UK. Whenever we want to do international comparisons, we are confronted to a whole range of empirical problems which are due to the differences of practice between the national statistical agencies. It is important to clear out these differences because empirical conclusion can be inverted depending on the type of conventions adopted.

2 Poverty in Europe

Both papers are dealing with the measurement of poverty and inequality in Europe. Does it make sense to talk about poverty in rich countries? When we know for instance the situation in some African countries? The poverty line in Europe, defined as half the mean country income is certainly far above the mean income of some countries in the rest of the world.

There are at least three reasons for being concerned about poverty in Europe

1. First of all, Europe is not a homogenous area. Poverty in Denmark is certainly very different from poverty in Portugal or in the new east European members.
2. Poverty in Europe is related to the concept of social exclusion. What is the minimum income in order to be able to be an active member of society. There are people who have no job, people while still having a job have not enough money to have a decent dwelling or any dwelling at all.
3. Poverty is the target of several economic policies, national or even European. Governments need knowing fact and figures in order to target their policy.

2.1 A European policy

Up to now, the building of the European Union was mainly centered on the realisation of a common free market. However, the European commission started to be concerned about the measurement of poverty with a first report in 1981. Eurostat started to produce good survey data. The Lisbon European council of 2000 marked a change of perspective in the European policy, stating the strategic goals of a greater social cohesion in Europe and of the eradication of poverty. This strategy led to the adoption in 2001 of the Laeken social indicators including income inequality indices and poverty. These indicators are meant to compare the social performance of each European member.

2.2 Stylised facts

Atkinson relates empirical investigations which were led under the authority of the European Commission in its programme against poverty. The basic definition of poverty in the EU was

Definition 1 *In the EU, is considered as a poor any person with an income lower than 50% of the mean income per inhabitant of the country where that person lives.*

First, this is a relative definition of poverty. The poverty is defined by reference to the mean income. Secondly, this a national definition, because it is relative to the mean income of the country where the person lives. There is no global poverty line for Europe.

Using that definition, there were 36.8 million poor in the 12 European countries in 1975. This number went up to 44 million in 1985. Finally, using consumption instead of income, that number was changed into 50 million of poor in 1985 to reach the Eurostat number of 57 million in 1993.

These numbers played an important role for mobilising policy. They also play a role for policy execution, in order to measure the impact of public policy on the level of poverty. They play exactly the same role as the unemployment rates do for labour market policies.

Atkinson reports the following Table 1 which gives the number and percentage of poor in 1988 for the 12 countries of the European Union at that time.

Table 1: Poverty in Europe
(1988 figures from Atkinson 1998)

Pays	Number of people (in millions)	Pourcentage
Portugal	2.5	25.5
Italy	12.1	21.1
Greece	1.8	18.7
Spain	6.5	16.9
Ireland	0.5	15.7
United Kingdom	8.4	14.8
France	8.2	14.7
Luxembourg	0.041	11.1
West Germany	6.6	10.9
Belgiun	0.7	7.4
Netherlands	0.7	4.8
Danemark	0.2	3.9
Total	49.0	15.0

These number indicates that poor countries, where the percentage of poor is the greatest are southern countries: Portugal, Italy, Greece and Spain. However, when we consider the absolute number of poor, they are located in the largest countries which are France, Germany, Italy et The UK.

These figures were much criticised, especially by UK politicians who claimed that poverty was nothing but another measurement for inequality. There are clearly problems of measurement that we shall discuss now.

Changing definitions might have a large effect on poverty measurement, and in particular on the causes of poverty. Two groups are concerned

- The elderly
- Large families

Targeting policy is thus different according to the definition of the poverty line.

2.3 Comparing France and the UK

- French INSEE made a national study in 1989 using tax declaration and household budget surveys
- The British department of social security (DSS) produced annual regular studies between 1991 and 1996 based on the FES.

Both approaches made use of the same type of data as those recommended by the EU which itself produced poverty estimates (survey data: enquete sur le budget des familles et Family expenditure survey). In Table 1, France and the UK are very similar. However, the respective national investigations produced very different results, even if they are based on an apparently identical definition of the poverty line.

The French and the British studies consider income while Table 1 considers spending. The EU report a poverty rate of 14.8% for the two countries, while France reports a poverty rate of 9.6% and the UK a mere 4.1%. We are first far from the EU estimates and secondly, these two figures report a radical difference between France and the UK. We can understand now why British politician criticised so much these European figures.

Atkinson show how one can go from the figures produced by national studies to those produced by Eurostat.

1. A poverty line is determined a fraction of a central tendency indicator: the mean or the median. The two are identical if the distribution is symmetric which is not in general the case for the income distribution. Then the median is lower than the mean. Asymmetry in the distribution is very different in France and in the UK. The French took the median while the British took the mean. The EU took the mean.
2. To compute the mean, we can use different weights because we have samples. We can choose an equal weight for every household like in France or a weight equal to the size of the household like in the UK. The results are not so different, but they vary in opposite direction for the two countries.

Table 2: Poverty rates and measurement units

Definition	France	UK
Median	9.6	4.1
Mean versus median	13.5	9.2
Individual versus household	12.5	10.3
DSS scale versus OECD scale	11.9	8.6
After housing versus before housing	13.0	13.6

3. Which type of equivalence scale should we use? The old OECD scale takes 1, 0.7, 0.5. France used it while the EU used the new OECD scale. The UK made use of a more complicated scale, taking into account the age of the children.
4. Finally, we can take income before or after housing costs. In the UK, this cost can vary a lot because of variable interest rates. Consequently, housing spending do not result from a decision taken by the household. For a good part, there are exogenous to the household.

We see that measurement decisions have a large impact on the political decision which was to define poverty as being below 50% of a target income.

- France: 50% of the median, weighting households as 1, OECD equivalence scales, income before housing. With these France poverty is twice that of the UK
- Adopting for both countries the UK choices: 50% of the mean, counting people instead of households, DSS equivalence scale, income after housing costs leads to similar poverty rates for the two countries.

3 Relative or absolute poverty

Choosing between a relative or an absolute poverty line is a delicate debate. We must define what we mean by poverty and by being a poor. Of course being deprived of basic needs such as food and housing is one definition of poverty. But, we must also try to have a dynamic definition of poverty. If the economy is growing but with increasing inequalities, a fraction of the population will be excluded from the benefits of economic growth. Is it fair, unfair? (les laissés pour compte).

3.1 Stylised facts

We have seen the definition of a relative poverty line in term of a fraction of the average. An absolute poverty line corresponds to the amount of income necessary to buy a given basket of

goods. The price of this basket is re-evaluated each year. This is a standard of living approach.

In the UK, we draw the following graphic. We define the poverty line as 50% of the average income in 1979. Then a standard of living approach implies that we correct this figure only for consumer prices, while the relative approach implies that we also follow the evolution of incomes. Since real incomes per head increased a lot between 1979 and 1993, this makes a big difference. We have a rather constant line of poverty in one case, while the relative definition provides a sharp increasing in the poverty rate (after housing costs). In Italy, this is just the reverse for the same period. With an relative definition, poverty rate slightly increased (from 8.3 to 10.2), while with an absolute line there was a sharp decline from 8.3 to 3.4).

However, we must note the difference between the standard of living approach which maintains constant a the poverty in term of purchasing power and the approach which defines an absolute level, using for instance the minimum number of calories necessary to survive or defines the composition of a reference basket of goods.

The first studies concerning poverty at the end of the nineteenth century or the ones reported in chapter 6 of Duclos and Araar (2006) are mainly concerned about determining a basket of goods x^* so that the poverty line π is

$$\pi = p \cdot x^*.$$

The poverty line is re-evaluated according to p , so that it can be different in town and in rural areas. For international comparisons, we could decide to keep the same basket of goods, but to convert it on the basis of purchasing power parities.

The composition of the initial basket of good has to be modified too. In the US, non-food requirements were introduced by dividing π by the share of food in average household budgets. Moreover, so goods of the basket might be no longer available. OR for getting job, a cellular phone seems to be necessary nowadays on top of a decent clothing. So in the long term a fixed bundle of goods and services seems untenable for defining a poverty line.

A relative line of poverty see poverty in term of deprivation to a certain minimum right to resources. A minimum income is a prerequisite for participation in a certain society, to be fully a citizen. 50% of the average has the virtue of transparency and simplicity.

3.2 Subjective poverty lines

People have in mind an idea about a poverty line. They can reveal this information in surveys. For instance this question was used in the US

What is the smallest amount of money a family of four needs each week to get along in this community?

The paper by Hourriez and Olier (1997) report a similar question for France in the Enquête sur le Budget des Familles. There is a vast literature dealing with the subjective approach which

is known as the “Leyden Approach” around the work of Bernard van Praag at the University of Leyden in the Netherlands.

Using this approach Van den Bosch, Callan, Estivill, Hausman, Jeandidier, Muffeis, and Yfantopoulos (1993) present a comparison of poverty in seven European countries or regions. They note that absolute poverty lines have an elasticity of zero with respect to average real income, while for relative poverty lines this elasticity is by definition equal to one. In the subjective method they use, this elasticity is endogenously determined, so that subjective standards are a priori neither relative nor absolute (see Hagenaaars and van Praag (1985)).

The subjective method takes account of the fact that poverty is a socially constructed category, and is not something that can be determined by an outside observer without regard to the circumstances and values in the surrounding society.

In this study respondents are asked to evaluate their own situation, on which they may be considered the best experts.

The Subjective Poverty Line (SPL) is based on survey responses to the Minimum Income Question (MIQ), which reads: “What is the minimum amount of income that your family, in your circumstances, needs to be able to make ends meet?” The answer to this question, Y_{min} , depends on a number of characteristics of the household, of which current household income y and household size N are the ones considered most relevant in the present context.

$$\log(y_{min}) = a + b_1 \log(y) + b_2 \log(N).$$

To find the poverty line, we have to find the point where this equation intersects with the line $y = y_{min}$. If the respondent has an income lower than his answer, that means that he cannot make ends meet, while for higher incomes, the converse is true. At the point where $y = y_{min}$, the household is just able to make the ends meet. So

$$\log(y * N) = \frac{a + b_2 \log(N)}{1 - b_1}$$

The subjective poverty lines can be regarded as being rooted in the everyday experiences of households trying to make ends meet, without necessarily representing a social or political consensus on the poverty line (which, anyway, may not exist).

Compared to a relative poverty line using the old OECD equivalence scale, survey data and 50% of the mean, we get a much higher value with the subjective line, except in the Netherlands (the effect of a protestant culture?). The ranking is thus not the same. But there are three distinct groups, whatever the method: Northern countries with a low poverty rate, southern countries and Ireland while Lorraine is in between.

(abstract) *Their results indicate that the subjective poverty lines are plausible in a comparative context, although the levels of the subjective standards are rather generous. The estimated equivalence scales are much flatter than the one recommended by the OECD. The extent of poverty is much greater in the “peripheral” EC-countries than in the “central” ones. Though similar factors are found to be associated with poverty in all countries, there are also important differences in the characteristics of the poor across countries. The impact of social security*

Table 3: Percentage of households in poverty by two standards in a number of European countries and regions

		SPL-standard	EC-standard
Belgium	1985	24.9	6.1
	1988	20.7	5.7
Netherlands	1985	8.6	7.1
	1986	15.9	7.2
Luxembourg	1985	23.2	7.6
	1986	12.5	7.6
Lorraine	1985	29.1	11.2
	1986	26.5	10.8
Ireland	1987	31.6	17.2
	1989	39.6	17.3
Catalonia	1988	37.3	15.1
Greece	1988	42.0	19.9

transfers on poverty appears to be much smaller in the southern countries Greece and Catalonia, than in the Benelux and Lorraine .

4 Other measurement questions

4.1 Revenu ou dépense

Tous les pays mènent des enquêtes sur les budgets des ménages, mais ceux-ci contiennent des informations variables sur les revenus. On s'accorde souvent à dire que la qualité des données portant sur la dépense est meilleure que celle des données de revenus qui sont souvent sous évalués.

Sur le plan théorique, une approche de pouvoir d'achat (ligne fixe) voudrait que l'on se base sur la consommation. Tandis qu'une approche en terme de droits minimaux ou de capacité voudrait que l'on se base sur les revenus. Mais bien souvent, le choix s'opère seulement en fonction de la question de la qualité des observations.

Ces choix ont une incidence sur la mesure de l'évolution de la pauvreté et sur la composition de la population des pauvres. L'UE a choisi de passer du revenu à la dépense, alors que le Royaume Uni a choisi de passer de la dépense au revenu, donc le choix inverse.

4.2 Famille ou ménage

Au Royaume Uni, on est passé de la famille au ménage. Cela a une incidence sur les mesure de pauvreté car le ménage est plus important que la famille. Il peut contenir plusieurs adultes, par exemple les enfants majeurs au chômage ou pas. Il y a donc agrégation de plusieurs revenus. Ceci a permis de faire passer la population avec un revenu inférieur à 50% de la moyenne de 11.1% à 8.1% en 1989. Plus généralement le coefficient de Gini sur la population totale est passé de 0.285 à 0.261. L'agrégation masque donc certains aspects de la pauvreté. Il faut désagréger les données pour étudier la pauvreté en détail. Par exemple, si l'on s'intéresse à la pauvreté des femmes, il faut regarder ce qui se passe à l'intérieur du ménage.

4.3 Les échelles d'équivalence

On observe des données sur des ménages qui ont des compositions différentes. Comment tenir compte de ces tailles différentes et surtout comment passer du bien-être du ménage au bien-être individuel? Les échelles d'équivalence permettent de passer de l'unité d'un ménage à celui d'un adulte équivalent. Si x_i est le revenu du ménage, le revenu de l'adulte équivalent va être obtenu en divisant le revenu du ménage par un nombre p_i

$$\tilde{x}_i = \frac{x_i}{p_i}$$

où p_i peut être calculé de différentes façons. On peut prendre $p_i = n_i$ où n_i est le nombre total de personnes dans le ménage. Mais en général, on va accorder un poids inférieur aux enfants par exemple. Le système fiscal français retient 1, 1, 0.5, 0.5 et 1 à partir du troisième enfant, ce qui signifie que chaque adulte compte pour une part, les deux premiers enfants pour une demi part, mais le troisième enfant pour une part entière. L'échelle OCDE donne 0.7 aux adultes non chef de ménage et 0.5 à tous les enfants. On a proposé dans la littérature

$$p_i = n_i^s$$

avec $s < 1$. Ce paramètre permet de résumer l'élasticité de p_i à la taille du ménage. Selon les échelles subjectives prises, ce paramètre peut varier entre 0.3 et 0.7. Ce choix de s permet de moduler la répartition des coûts à l'intérieur d'un ménage. Si les coûts fixes sont importants, on pourra prendre un s faible. Dans le cas contraire, le poids relatif d'une personne supplémentaire sera plus fort et alors un s plus grand se justifie.

En reprenant sa comparaison entre France et Royaume Uni, Atkinson montre qu'en faisant varier s on peut inverser le ranking entre des deux pays. Avec $s < 0.55$, le Royaume Uni a plus de pauvres. Avec $s > 0.55$, c'est la France qui a le plus de pauvres. En changeant la valeur de s , on change la composition de la population des pauvres. Avec $s = 0$, la majorité des pauvres se trouve dans les petits ménages. Avec s grand, ce sont les familles nombreuses qui constituent le gros des bataillons de pauvres.

5 Income distribution for the EU

In his book, Atkinson has considered a different poverty line for each country. More precisely, the poverty line is determined as 50% of the mean income inside each country. This is a logical choice if anti-poverty policies are led by states. But the EU is seen more and more as a global entity with a desired convergence between the member countries. Atkinson suggested that the following formula could be used for computing an alternative poverty line

$$\tilde{x}_i = \bar{x}_{EU}^\theta \bar{x}_i^{1-\theta}$$

where θ is a weighting parameter that has to be chosen a priori. Brandolini (2007) decided to have a global approach to inequality and poverty in Europe. The aim of his approach is to reach a new estimate of the income distribution in the enlarged EU as a whole.

5.1 Conceptual problems of measurement

We have households j in countries k , that have various source of income i (earnings, finance, land). The total income of an household is given by the formula

$$y_{jk} = \frac{\sum_i c_{ijk} x_{ijk}}{e_k p_{jk} m_k(h_{jk})}$$

where

- m is an equivalence scale, specific for each country
- h_{jk} specific characteristics of a household
- e_k a conversion rate for currency
- p_{jk} price index
- c_{ijk} a correcting factor because of the various data sources (macro, micro).

In national studies some of these item do not exist and the income of household j is given by:

$$y_j = \frac{\sum_i x_{ij}}{m(h_j)}$$

In usual studies concerning world income comparison, the basic point for comparison is the per capita gross national income computed in some international currency, mostly the dollar. This is the case for the Pen World Tables from the University of Pennsylvania, available on the Web at <http://pwt.econ.upenn.edu>. Here, we have to solve for various questions.

5.1.1 Currency conversion

Foreign rate of exchange not useful because depends on too many financial factors. It does not reflect the price structures that consumers are facing. Another approach based on PPP. They are based on the prices a fixed bundle of goods and provide in the conversion rate from a national currency to an artificial common currency. This is followed by EUROSTAT with the PPS Purchasing Power Standard. There exist also the international dollars.

This solution is not exempt of problems. There are various sources just because several international agencies have their own sources. Brandolini has used the EUROSTAT. But he could have used those of the World Bank or the OECD.

There are different methods, because there are different methods for aggregating individual prices using different types of weights.

Finally, we can compute PPP for GDP or PPP for household consumption HFCE. In 2000, using one or the other would make the real income of Finland or Poland 8 to 12% lower while making real income of Germany or Luxembourg 6 to 11% higher. GDP PPP reduces international differences, while HFCE PPP make them greater.

5.1.2 Differences in prices

Essentially, the price of housing is not the same everywhere and that can make a big difference. Adjusting poverty threshold for that reason.

5.1.3 Sample survey versus national account

We have various sources of information, survey and national account. There is a tendency to merge the two sources. They do not measure the same thing. There is GNI (gross national income) and HGDI (household gross disposable income). On average HGDI is only 64% of GNI. Household surveys are closer to the HGDI.

5.1.4 Equivalence scales again

For international poverty comparisons, per capita is used. Ignores simply the economy of scale in the household. UK has a tendency to use the Oxford scale, while EUROSTAT recommends using the new OECD scale. But researchers from eastern Europe claims that the scale economy are less important in their countries than in Western Europe simply because the budget share of food is greater and housing cheaper. Housing is the great item where the scale economies are at work. So it would be nice to have a scale depending on the level of income.

5.2 Income distribution in Europe

There are nice data sources for the 15 countries of the EU in 2000. The European panel was a common adventure in order to provide a unified and harmonised source of survey data for the 15 members. For the other countries, there is the LIS (Luxembourg Income Study) where harmonisation is done ex-post.

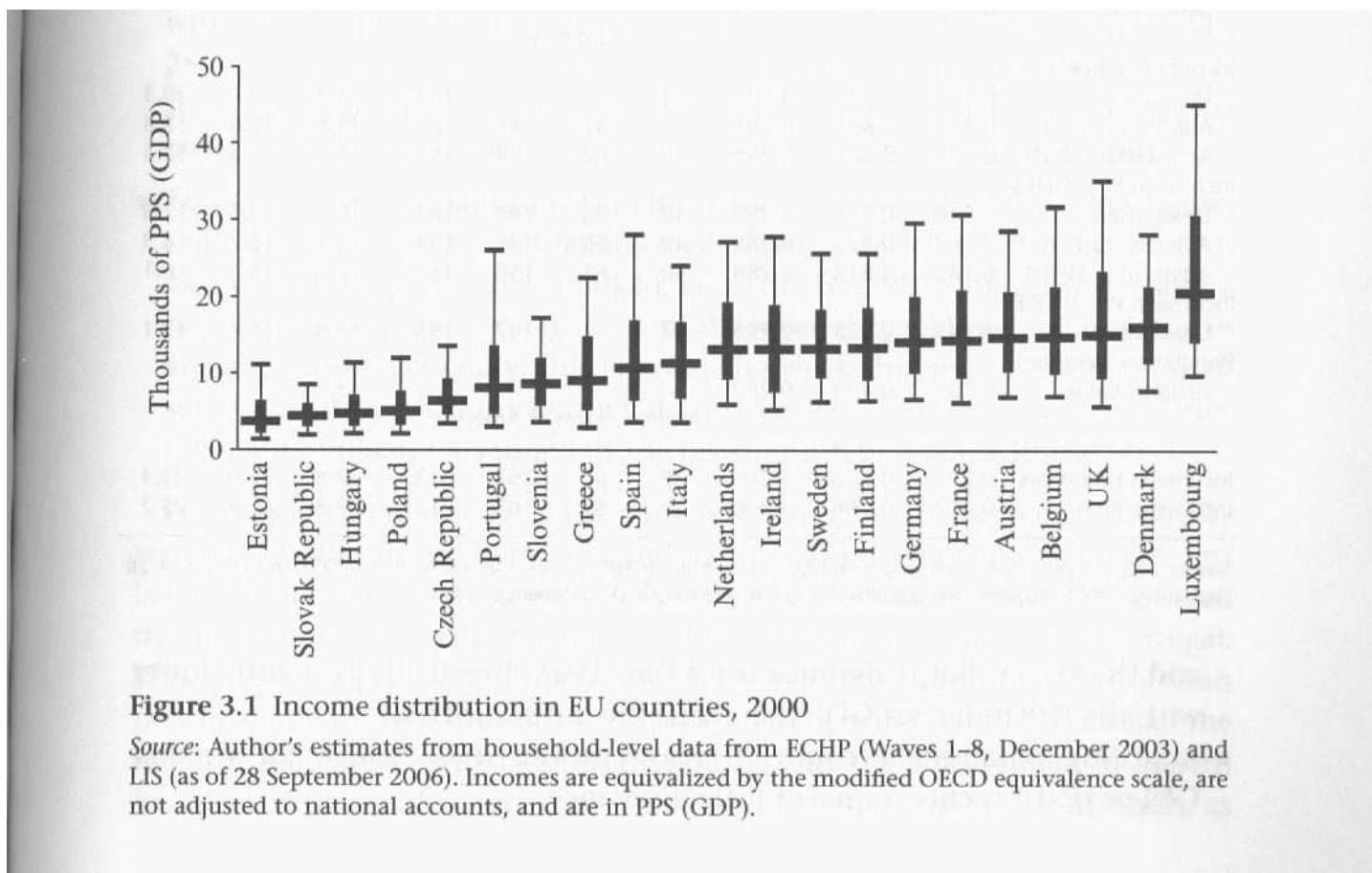


Figure 1: Income distribution in 21 EU countries

Figure 1 present the income distribution for 21 out of 25 European countries in 2000. Are ignored 4 countries with not enough data: Malta, Cyprus, Latvia, Lithuania.

We see on this graph

- the country median (thick horizontal mark)
- the distance between the 20th and the 80th quantile (thick vertical bar)
- the 5th and 95th percentiles (thin vertical bar)

There are several groups of countries

- The Eastern countries
- Portugal Slovenia and Greece (southern Europe)
- Spain and Italy
- Europe from Ireland to Belgium

- The contrasted cases of Denmark and the UK
- Luxembourg

Detailed Tables in Brandolini shed some more light on the influence of methodological choices. Large inequalities in Estonia, Portugal, the UK.

- Inequality is higher when measured in Euro instead of PPP.
- Inequality is highest when measured in per capita. It is lower with the modified OECD than with the old OECD.
- Inequality is higher when measured at a whole than when obtained by averaging national values weighted by their population.

5.3 Poverty in Europe

With national poverty lines, there are 68 M of poor in EU-25.

A common poverty line increases the contrast between Est and West Europe. A common policy to reduce policy. Moves the location of the poor. None is left in Luxembourg. But in southern Europe, a large fraction of people are reclassified as poor.

EUROSTAT studied poverty with $\theta = 0$. There was 15% of poor in 2000, regardless of the boundaries of Europe.

Adopting $\theta = 1$ raises the incidence of poverty as shown in Table 4. The geography of

Table 4: European poverty line for E25

	$\theta = 0$	$\theta = 1$
P_0	0.15	0.23
N_0	68M	103M

poverty also changes. More than half of the eastern Europe falls in poverty. A part of the population falls into poverty in southern Europe. The contrary happens to the rest of Europe. Poverty disappears in Luxembourg.

5.4 Comparing Europe and the USA

All the estimates suggest that inequality is less important in Europe than in the US. This is also true for the E25.

The only difference comes from the PPP adjustment. This adjustment entail large variations in Europe, especially in the E25. When calculated within the States of the USA, there is virtually no difference. This indicates an integration which is accomplished in the USA while it is not yet in the EU.

Table 5: Gini and P_0 per capita for the USA and for EU

	USA	EU-15	EU-25
Gini	0.399	0.324	0.357
$P_0, \theta = 0$	23.9	17.2	17.2
$P_0, \theta = 0.5$	24.0	17.7	19.8
$P_0, \theta = 1$	24.1	18.6	24.0

6 Pen world tables

available at <http://pwt.econ.upenn.edu>.

Alan Heston, Robert Summers and Bettina Aten, Penn World Table Version 6.3, Center for International Comparisons of Production, Income and Prices at the University of Pennsylvania, August 2009.

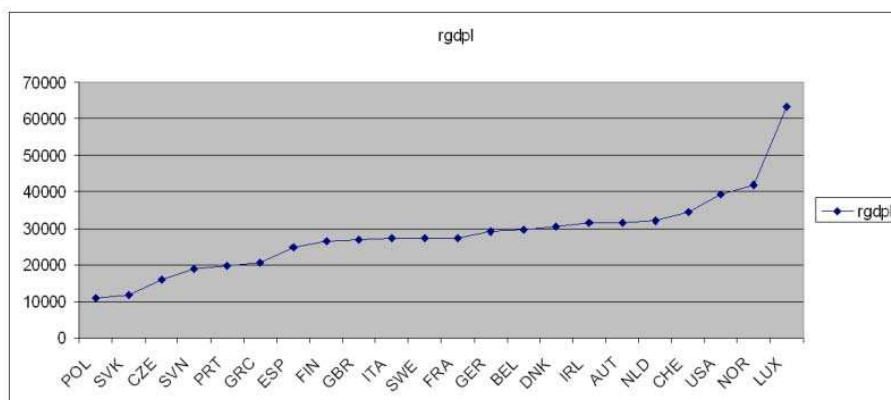


Figure 2: GDP per capita from the Pen Tables, constant prices

Figure 2 presents the ranking of countries for Real GDP per capita in constant prices drawn from the Pen Tables (variable rgdpl). If the global ranking is the same as the one found by Brandolini, there is a huge difference for the UK.

In Figure 3, we draw a similar graph using this time GDP per capita adjusted for PPP. Note the differences with the previous Figure.

7 L'évolution de l'accès aux bases de données

L'analyse de la distribution des revenus et la mesure de la pauvreté suppose que l'on puisse avoir accès à des données individuelles d'enquête. Si ces données d'enquête existent depuis longtemps,

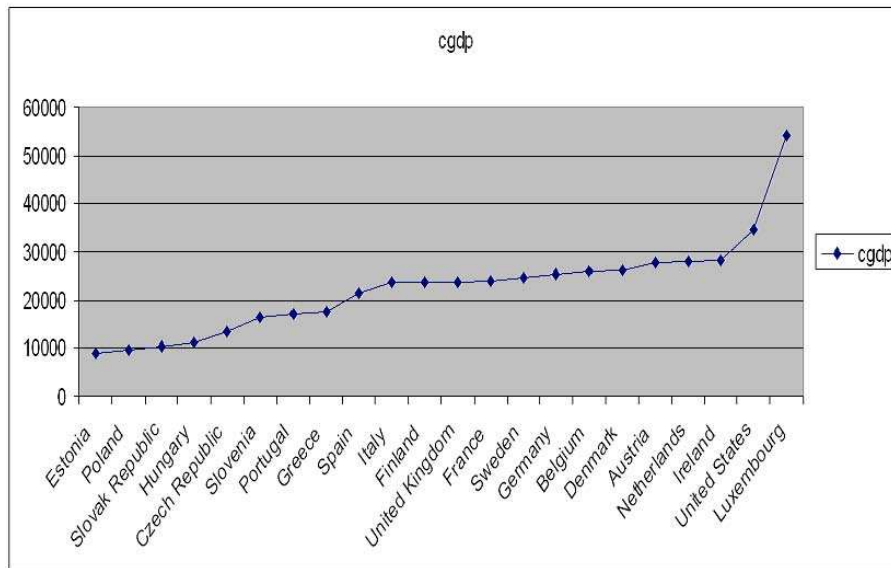


Figure 3: GDP per capita from the Pen Tables at PPP

leur champ s'est considérablement élargi depuis vingt ans. Ainsi le PSID américain (Panel Study of Income Dynamics), la base micro-économique la plus connue, est passé de 400 variables en 1968 à 3000 en 2005. Mais l'accès à ces bases de données pose le problème de la confidentialité et donc des procédures d'anonymisation. L'examen statistique des chiffres ne doit pas permettre de retrouver la personne interrogée; par exemple il ne doit pas permettre de publier la feuille d'impôt d'un personnage connu. Or il est évident qu'au plus l'enquête comporte de variables renseignées, au plus il sera difficile d'anonymiser les informations contenues dans cette enquête. C'est sur cet arbitrage que repose toute la problématique d'accès aux données et les restrictions imposées par les agences statistiques qui les produisent. On va essayer de faire un état des lieux et de son évolution dans différents pays.

7.1 La France

En France, l'INSEE est le principal pourvoyeur de données d'enquêtes. L'accès à ces données a toujours posé problème pour les chercheurs, si bien qu'en 1999 Claude Allègre, Ministre de la Recherche donne à Roxane Silberman une Lettre de Mission pour mettre en place les instruments nécessaires pour en faciliter l'accès. Le rapport Silberman de 1999 aboutira en 2001 à la création d'une unité mixte de service par le CNRS, le Centre Quetelet. Ce centre a effectué tout un travail de mise en forme de différentes enquêtes. En ce qui concerne la mesure de la pauvreté, il s'agit principalement des enquêtes successives de l'INSEE sur les budgets des familles.

De cette initiative, il ne reste aujourd'hui que le réseau Quetelet qui est un portail de recherche sur la disponibilité de données en sciences sociales: <http://www.centre.quetelet.cnrs.fr>. Il renvoie

entre autres au Centre Maurice Halbwachs (ancien LASMAS) à Paris qui se charge maintenant de leur diffusion. Leur accès est règlementé, mais gratuit. On est donc revenu à la situation de départ. Le chercheur dépend de la politique de diffusion de l'INSEE, qui est devenu plus restrictive au fil du temps. Il y a une différentielle d'accès très marquée entre les chercheurs faisant partie d'un centre rattaché à l'INSEE et les autres. Il est par exemple très difficile, si ce n'est quasi impossible, d'obtenir le croisement de deux fichiers.

7.2 L'Europe

Le chercheur français peut se tourner vers le réseau Européen EQUALSOC (Economic Change, Quality of Life and Social Cohesion <http://www.equalsoc.org>) pour avoir un accès direct et gratuit au Panel Européen, après agrément. Le Panel Européen était une enquête européenne sur les conditions de vie des ménages mis en place par EUROSTAT voici une quinzaine d'années. En 2001, cette enquête a été remplacée par une enquête plus large sur les revenus et les conditions de vie dans l'Union Européenne (EU-SILC, "European Union-Statistics on Income and Living Conditions"). La fourniture d'informations statistiques a désormais force de loi pour l'ensemble des pays de l'Union alors que ce n'était pas le cas pour l'ancien panel. Cet outil devrait permettre de mieux analyser les phénomènes d'exclusion et l'impact des politiques sociales et fiscales sur la redistribution au niveau Européen.

Le Luxembourg Income Study (LIS, <http://www.lisproject.org>) correspond à un projet déjà ancien (1983). Il collecte des données d'enquête sur les ménages pour une trentaine de pays. Outre les pays Européens, participent également l'Australie, le Canada, Israël, le Mexique, Taiwan, la Russie et les USA. A partir des données d'enquêtes nationales, le LIS produit une base de données individuelles harmonisées portant sur les revenus et les autres variables du même champ. Il a servi de base à de nombreuses études de comparaisons internationales (voir Jenkins et Micklewright 2007 pour un survey). On notera le rôle pionnier du LIS dans l'accès aux données individuelles. Mais si cet accès est gratuit, il est toutefois limité. On ne peut accéder à ces données que sous la forme de l'exécution d'un programme SAS avec impossibilité de récupérer les données elles-mêmes en vue d'un traitement sur un autre logiciel.

7.3 Le Royaume Uni et les USA

La situation dans ces deux pays est relativement particulière et si l'on peut dire plus en accord avec la pratique des chercheurs. Dans les années 1970, les chercheurs britanniques n'avaient accès qu'à des données groupées. Ils peuvent maintenant accéder directement aux données du Family Expenditure Survey (FES) sur les trente dernières années en les téléchargeant sur <http://www.data-archive.ac.uk/findingData/fesTitles.asp>. Mais il faut être un utilisateur enregistré et avoir un mot de passe. To be registered, you have to apply, declare what you intend to do with the data, and sign a document of confidentiality. You can then download the FES and the BHPS (British Household Survey Panel).

Le Panel Study of Income Dynamics (PSID), a débuté en 1968 aux USA. Il s'agit de données de panel fournissant un échantillon représentatif des conditions de vie de la population des USA.

Il concerne environ 8 000 ménages suivis sur une base annuelle. Ce sont toujours les mêmes ménages qui sont interrogés. On peut télécharger les données sur le site <http://psidonline.isr.umich.edu>. Il faut être un utilisateur enregistré, mais l'enregistrement ne semble pas très restrictif. You can have access to to another smaller data set very easily which is the

7.4 La Banque Mondiale et les pays en développement

Depuis 1980, la Banque Mondiale s'est lancée dans la constitution de bases de données micro-économiques les *Living Standards Measurement Surveys* (LSMS). Ces enquêtes concernent une quarantaine de pays, en très grande majorité des pays en voie de développement. On peut accéder à ces données sur le site de la Banque Mondiale: <http://www.worldbank.org/lsm>. Deaton (1997) donne un bon aperçu des études qui ont été faites à partir de ces données. On trouvera également sur ce site les codes sources de programmes Stata utilisés dans Deaton (1997).

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