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## **KNOWLEDGE IN TIMES OF CRISIS: TRANSFORMING RESEARCH-TO-POLICY APPROACHES**

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# Arab Region Social Protection Systems: Research and Policy Design Challenges\*

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**Abstract** This article examines the challenges and opportunities that exist for the production of knowledge and the design of evidence-based policies which aim at achieving more equitable and inclusive social protection systems in the Arab region. The article builds on the experiences of researchers and activists following the outbreak of the Covid-19 pandemic and considers the challenges they faced. It examines the root causes of those challenges as related to data collection, analysis, and interpretation; the adopted research methods and approaches; the typology of researchers, research subjects, practitioners, and activists; the research outputs and the policy recommendations ensuing from them; and the policy spaces encountered when lobbying for the necessary reforms. The article proposes solutions to extend the struggle against the 'violence of modernity' when trying to influence policymaking, suggesting a departure from normative forms of knowledge production and advocacy on socioeconomic rights in the Arab region to more homegrown, engaged forms.

**Keywords** social protection, Arab region, research, policy, challenges, decolonising knowledge, Covid-19.

## 1 Introduction

The Covid-19 pandemic has uncovered major flaws and deficiencies in Arab social protection systems. This has put the discussion about ways to expand social protection coverage to the most vulnerable social groups centre stage in research and advocacy efforts for post-pandemic recovery strategies and reforms in the region. Researchers, practitioners, and activists have come to realise that building universal, effective, and sustainable social protection systems is key to enabling Arab populations to overcome the social repercussions of any political or economic shock. This includes the loss of livelihoods



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and livelihood opportunities and the inability to access essential goods and services.

The successive and overlapping crises accompanying the pandemic have reasserted the need for solid social security infrastructures to strengthen people's resilience to the various threats to decent life standards. These crises range from the impact of the Russia–Ukraine war on food and energy security to the global river crisis,<sup>2</sup> amid other consequences of climate change, and passing through political along with financial/economic crises hitting countries such as Iraq, Tunisia, Lebanon, and Egypt. Such infrastructures are not only necessary for crises' preparedness but also to ensure that the poor, marginalised, and vulnerable are less susceptible to uncertainties and shaky socioeconomic circumstances affecting their day-to-day life and regular pathways, in general.

In 2020, right before the outbreak of Covid-19, the United Nations Economic and Social Commission for West Asia (UNESCWA) *Arab Sustainable Development Report* revealed that, in Arab non-Gulf Cooperation Council (GCC) countries, the proportion of the population below the international poverty line of US\$1.90 per day was nearly 16 per cent. 'Extreme poverty was also higher than the world average and all other developing regions except for sub-Saharan Africa', according to this report (UNESCWA 2020a: 14). The multidimensional poverty rate reached 41 per cent for ten Arab countries, making up around 75 per cent of the region's population (*ibid.*). Four months into the pandemic, the UN regional commission announced that an additional 8.3 million people will fall into poverty in the Arab region, which 'could raise the number of undernourished people by some 2 million' (UNESCWA 2020b).

In addition, when the average unemployment rate of the Arab region was already the highest worldwide (UNESCWA 2021a) and informal employment represented 68 per cent of total employment prior to Covid-19 (ILO 2018), the pandemic led to an unprecedented increase of 1.3 percentage points in the unemployment rate in non-GCC Arab states (ILO 2022) and left more than 39 million individuals in the region working in hard-hit sectors (UNESCWA 2021b). These figures are coupled with the highest concentration of national wealth in the world, hovering around 60 per cent of the wealth being captured by the richest 10 per cent of the Arab population (Kallas 2021). This indicates an outstanding level of inequality and implies acute forms of social vulnerability whereby poor populations have to endure constant economic hardships.

Despite this bleak status quo, the social policies of Arab states have been arbitrary and inadequate in responding to the needs and socioeconomic demands of their populations. Only 40 per cent of the total Arab population is currently covered by at

least one social protection benefit. Moreover, only 7.2 per cent of people with disabilities, 8.7 per cent of people who are unemployed, 12.2 per cent of mothers and newborns, 15.4 per cent of children, and 24 per cent of older persons have access to social protection benefits – among other vulnerable groups (ILO 2022). Public social spending remains poor in the region, being merely around 4.6 per cent of gross domestic product (GDP) on social protection (excluding health care) and 3.2 per cent of GDP on health (*ibid.*). The pressing concern is, therefore, the importance of tackling the issue of fragmented and frail social protection systems in the Arab region which are leaving many behind and are – in the best-case scenario – providing community-scale social assistance instead of nationwide social security.

In order to tackle this issue and promote inclusive systems, which typically combine universal and targeted approaches of delivery mechanism, it is imperative to produce the scientific knowledge required to propose and advance feasible solutions on the level of policy and programmatic reforms, legal reforms, institutional reforms, and financing schemes, but also social and political reforms. The question of improving social protection services is complex as it necessitates addressing the politico-economic and governance factors driving Arab states away from assuming this responsibility. It also requires understanding people's awareness of the concepts of social protection as one of the human rights principles and one of the fundamentals of the social contract that ties people to states, as well as the prevalence of the culture of law amongst them and the extent to which social protection reforms might (or not) be reflected in demand-based social movements.

As such, producing research on the topic at hand in order to shape pragmatic policy recommendations and advocating the latter have proven to be a daunting task. The 'traditional' way of undertaking this task does not seem fit for purpose, as the concerted efforts of the different social actors following the pandemic have only made a slight improvement in the prevailing social protection systems, rendering these actors helpless in the face of such a significant crisis. It is therefore of primary importance to examine the challenges and opportunities of research and policy design aimed at achieving more equitable and inclusive social protections in Arab countries.

This article outlines these challenges and delves into analysing the root causes behind them, notably those related to data collection and interpretation; the adopted research methods and approaches; the researchers, research subjects, practitioners, and activists involved in these processes; the research outputs and the policy recommendations ensuing from them; and the policy spaces encountered when lobbying for the necessary reforms. It also suggests ways to overcome these hurdles and turn the trade-offs cutting across them into prospects for positive change.

The main reasoning behind our elucidations lies in the need to decolonise our research methods and methodologies in the region, as well as localise our knowledge production and tools for knowledge impact and transmission. We believe this shift could emancipate those researchers and practitioners seeking to expand social protection to vulnerable groups in the Arab region from the typical 'way of doing business' and the dictated learning and misconceptions. Such challenges have thus far constrained numerous attempts of these actors and even set them up to fail.

The presented analyses and propositions are based on the author's experience as a mid-career Arab scholar who has been working for over eight years in the field of social and development economics across the Arab region, using both quantitative and qualitative research methods. Managing relevant research projects – including one specifically on social protection in the Arab region – and synthesising their findings and processual challenges, in addition to engaging in continuous discussions with a wide array of actors in the field, the author has acquired over the years a reservoir of observations that have been counterchecked and supplemented by a thorough desk review of the existing literature for validation. The article is also informed by complementary interviews with established and junior actors in various fields. It ultimately aims to provide a hands-on practitioner think piece for those willing to rethink their approach in their struggle for social justice.

## **2 Data: 'bad science' practices**

For reform and change, we need research; and for research, we need data. Both universal and targeted social protection programmes need comprehensive data sets to reach the intended beneficiaries. However, the Arab region suffers from data poverty (Makdissi, Marrouch and Yazbeck 2022). Countries such as Iraq and Lebanon have not had their censuses updated for more than 25 years. Only three out of 16 non-GCC Arab countries (namely Morocco, Jordan, and Egypt) have national unified social registries (UNESCWA 2019). Archives and documentation are scarce. Even when they exist, the data – whether quantitative or qualitative – is incomplete and covers limited population samples. It is often missing cross-sectional observations, data points in the time series, and/or parameters. Moreover, it is often not disaggregated (by gender or even sex; age group; social/income class; geographic distribution such as region, country, rural versus urban, and core versus periphery; by common forms of social vulnerability such as disability, informality, and legal status, etc.). The Arab region also lacks sufficient micro-level data which is usually generated by household surveys and field reviews, although these are indispensable for studies that tap into socioeconomic needs and services such as those in relation to social protection expansion.

Both the existing incomplete data and efforts to compensate for these gaps fall under the remit of mainstream experts and theorists or international organisations. This conundrum entails a pseudo-sampling dilemma whereby researchers survey or interview what they imagine are vulnerable communities. This is mainly the result of a colonial capture of perception and cognisance (Staddon 2020) whereby the scholars come into the research process with expectations from the outset, thus making them define the problem instead of letting the problem define itself (Berk 1983). Consequently, researchers end up diagnosing an issue that does not exist or surveying people that are not actually impacted, which wastes the resources allocated for the issue at hand and for those most in need.

While this dilemma does not preclude rightful identifications of forms of vulnerability (e.g. women, children, youth, the elderly, migrants, informal workers and those in precarious labour, rural populations, people with disabilities), it does not take into consideration the need to rethink our understanding of vulnerability, even though this is critical if new forms of vulnerability are to be included (forms that arise with particular shocks/crises) as well as invisible forms of vulnerability in remote and marginalised ecosystems (e.g. marine, forest, urban), which are often overlooked and unforeseen (Al Shami 2022).

In addition to the mis-sampling dilemma, existing data and data collection methods involve bad practices in soliciting, reporting, and interpreting information. Arriving with pre-learned misconceptions and stereotypes, researchers tend to look for or solicit information that does not demythologise their hegemonic beliefs. A European social scientist and field researcher operating in Lebanon, who prefers to remain anonymous, said during a key informant interview with the author: 'I felt like I contaminated the pseudo-observed with my biases.' Furthermore, according to Walid Marrouh,<sup>3</sup> field researchers are often victims of the trade-off between the research subjects' stated preferences and revealed preferences when reporting information and interpreting data. He said,

*While the former preferences are subject to the biases and perceptions of the surveyed, the latter are subject to those of the surveyor... Yet, rare are the researchers that account for both types of input and crosscheck them with each other to ensure the robustness of their analyses. In most cases, revealed preferences are considered, usually also leading to macro-level data that does not serve to inform about the most underprivileged and the left behind.*

The expressions of this dichotomy are more intense in less-developed countries where people's behaviour can be misleading due to factors related to social norms, family law, religion, and security concerns, and where people are more likely

to manoeuvre livelihood-related questions as a result of poverty and aid expectations from the inquirers (Whittington 2010).

These impasses – to name a few – hinder Arab stakeholders' ability to produce context-specific and homegrown knowledge, and rather impose ready-made solutions through biased understandings and tangential interventions.

### 2.1 Quantitative data and indicators

Most of the data shortfalls mentioned above are more acute in the case of quantitative data and indicators compared to qualitative ones since quantification entails many operational interventions and alterations to the numbers. These can include weighting a variable by another variable, normalising the variable, standardising the variable, treating outlier observations, censoring the distribution, and capping the variable for aggregation purposes. Numbers are also calculated on the basis of many 'hypothetical' assumptions to rule out presumed 'external' factors when shaping up an indicator or establishing a relationship between two or more variables, although these factors we are controlling for might be at the core of the problem we are trying to solve. Moreover, numbers are less expressive of human facts whereas issues such as exclusion from social protection schemes are human issues that need to incubate what numerical methods eliminate and consider as 'subjective' thoughts or feelings. The problems of incomplete data sets, lack of disaggregation in the data, and lack of sufficient micro-level data are also especially accentuated when applicable to statistical information.

Quantitative indicators are therefore quality-agnostic.<sup>4</sup> Whether the data that is entered into their calculation is collected on the macro or micro scale, on the national scale, or on a limited scale, quantitative indicators are predominantly macro-indicators that are defined as put forward by international financial institutions and intergovernmental organisations who prioritise the global comparative lens over the need to regard regional, national, and local context specificities (Abu-Ismaïl, Abou Taleb and Ramadan 2012). Examples of these macro-indicators in the social protection/justice arena include 'government health expenditure as a per cent of GDP', 'government education expenditure as a per cent of GDP', and 'subsidy spending as a per cent of GDP' (often disaggregated by food subsidies and energy subsidies).

These examples are illustrative of the extent to which these indicators do not reflect the differential impact of government interventions on diverse social groups and the distribution of social spending among these groups. For instance, while Tunisia's subsidy spending has long been one of the highest in the region, subsidies were proven to be significantly regressive in the country, with the two highest income quintiles appropriating the biggest share of both energy and food subsidies



(Cuesta, El-Lahga and Ibarra 2015). This suggests the need for 'creative', 'out-of-the-box' indicators that better capture the realities of vulnerable communities and which do not focus on some of these communities at the expense of others whose type of vulnerability is new, uncommon, or invisible.

Speaking about social protection more specifically, the only quantitative indicator that has been consolidated and used is Sustainable Development Goal (SDG) 1.3.1, the 'proportion of population covered by social protection floors/systems, by sex, distinguishing children, unemployed persons, older persons, persons with disabilities, pregnant women, newborns, work-injury victims and the poor and the vulnerable' (UN DESA n.d.). While this indicator seems to be sensitive to the social fabric needful of social protection the most, its rationale focuses on those included and not those excluded. This is mainly the case because the United Nations Department of Economic and Social Affairs (UN DESA) statistics division classified it as a 'Tier I indicator' only a couple of years before the outbreak of Covid-19, on the basis that its 'data are regularly produced by countries for at least 50 per cent of countries and of the population in every region where the indicator is relevant', although these criteria do not apply to all the sub-indicators of this indicator, nor do they apply in disaggregated terms, i.e. for the data series covering the different forms of vulnerability mentioned in the indicator's label. Moreover, of the countries that do not fit these criteria, many are Arab countries, and the indicator is reported by states only every second year (UN DESA 2020).

This most recent classification is also despite the fact that the data series only cover the access of each vulnerable group to either 'at least one' or to 'strictly one' type of social benefit – whether that is social assistance, social insurance, or a labour market programme – hence looking merely at pensions for older persons, maternity benefits for women, and employment injury coverage for workers, for example, and overlooking other key needs of these social groups. Additionally, with data being collected by state institutions on the macro/national levels, this indicator provides summative proportions which offer inaccurate information that is insensitive to the multidimensionality of people's life conditions, and excludes those whose income/consumption is not reported through official government statistics such as those who are unregistered, undeclared, or who work informally.

The colonial quantitative indicators in effect are also not reliable enough for those whose objective is to support the poorest and most marginalised. The methods used to calculate these indicators, and the sub-indicators and data series out of which they are composed, yield underestimates of the levels of poverty and inequality (Sarangi *et al.* 2015). During a key in-depth interview, Adib Nehme<sup>5</sup> mentioned that two major reasons are

behind the simplistic and underestimating measuring tools of poverty: relying on income and consumption as the sole indices of deprivation instead of the eventual ability of a person to meet their basic needs and access the opportunities they deserve; and not counting what is not measurable/quantifiable, such as human and psychosocial needs, a feeling of incapacity, and an inability to prosper. He believes that these drawbacks ignore the fact that not all aspects of life can be standardised and that what is different/divergent from the general course of the pilot contexts based on which poverty indicators were built still matters:

*For instance, assuming there is a poor family that had to withdraw a child from school for not affording their education, and in order to have them work and contribute more income to the household. Assuming there is another family which has the same characteristics as the previous one but whose child is still enrolled in school. Reliance on expenditure data in poverty calculations can make the first family seem richer because of relatively higher income due to the child's work. Poverty is not merely material deprivation.<sup>6</sup>*

Nehmeh also pointed out that not considering a family as poor just because they own a bicycle as a means of transportation, own a laptop, or even have a toilet at home is inappropriate in most Arab countries nowadays, and he stated that such miscalculations are due to the fact that poverty measures stem from least-developed country cases that do not fully apply to Arab societies.

Nehmeh likewise flagged the downside of giving all dimensions and all sub-indicators under each dimension the same weight when calculating the final multidimensional poverty index, which sometimes puts secondary aspects of life on the same level as primary ones, and vice versa. In other words, this leads to an underestimation of the education poverty threshold and an overestimation of the food poverty one, for example. Furthermore, despite acknowledging the importance of micro-level data for reasons already mentioned in this article, Nehmeh highlighted two disqualifiers associated with this type of data as it currently exists: (1) no matter how large the micro-level survey is, it remains narrow-scale and hardly generalisable and representative of the context being studied; and (2) micro-level data is usually collected through household surveys that consider the household to be the unit of observation. The second disqualifier could lead to biased estimates of the poverty level of some households due to the life conditions of only one or two individuals in these households. It also sees the household as a homogenous unit, not taking into consideration the differences in the needs, aspirations, and opportunities of the different household members (e.g. women versus men, old versus young, educated versus non-educated, people with disabilities versus people

without disabilities) as well as the social norms and inequalities manifesting between them (Clark and Steel 2002).

Finally, Nehmeh emphasised how quantitative data is sometimes falsified and used as a manipulative tool by the power holders. The fact that different agencies provide different values (in both absolute and relative terms) of the same socioeconomic variable, and the fact that different indices of the same variable sometimes lead to different conclusions, lends substantial validation to his statement. In fact, many political economists believe that an overestimation of poverty and inequality rates on the macro level is deliberately induced by international organisations who wish to later report 'achievements' in poverty alleviation and inequality mitigation (Gillie 1996).

Additionally, an awareness of this overestimation – when it exists – allows policymakers to largely evade their responsibilities. More importantly, according to Walid Marrouch, macro socioeconomic indicators are not malicious if available for large samples that enable the creation of patterns and if they are thought of as 'proxies' to inform global or regional policies. However, he noted that the approach followed by international organisations spearheading the calculation of these indicators is a Rawlsian maxi-min approach,<sup>7</sup> which begins by maximising the social welfare preferences of the poorest person in society and expands this intervention to all other income groups. We believe that this model makes the rich better off as it channels resources supposedly for the poor to the well-off on the basis of equality of opportunities instead of outcomes.

## 2.2 Qualitative research

Although quantitative data is the most commonly used data for research related to socioeconomic issues/rights such as social protection coverage, qualitative data also has a considerable stake in this research field as it has been used since the late 1990s as an 'imaginary alternative to decolonizing research methodology' in the Arab region (Habashi 2015). The reason why we think resorting to qualitative research as a remedy is 'imaginary' is because it is driven by promoting a unified Arab discourse as a response to colonising discourses, thus not accounting for the diversity of ideas, cultures, and realities in a non-cohesive region. Qualitative research could, however, represent an important method to produce purposeful and impactful knowledge on optimising the social welfare of vulnerable groups, if one becomes mindful of the bad practices currently distorting this kind of research and make sure they are addressed (Little 2014).

One of the main shortcomings of qualitative research is that it largely relies on informant interviews (e.g. in-depth interviews, semi-structured interviews), focus group discussions, and ethnographic field studies. These methods can be very costly,

time-consuming, and labour-intensive (Miller and Salkind 2002). Therefore, conducting them on large enough samples that are representative and that generate generalisable trends/patterns is difficult and dependent on the availability of resources.

The same applies to cases where qualitative research is only meant to obtain detailed information from a small group of participants in order to later delve deeper into quantitatively investigating diverse aspects of the topic on large-scale representative samples (Emerald Publishing n.d.). This is where the role of research funding comes into play. As substantial funding is generally made available by international donors, endowments, and financial institutions, qualitative research methods and methodologies are restricted by the approach, ideologies, agendas, and ways of doing business of these international entities (Sattari *et al.* 2022; Aagaard *et al.* 2021).

This funding constraint also influences who undertakes this type of research on a wide scale: scholars studying or teaching at 'Western' academic institutions, international organisations, and privileged researchers from developed countries. When local researchers conduct this kind of research, they are also often the students, alumni, or trainees of the former group of actors or the employees of the latter two groups (Currie-Alder, Arvanitis and Hanafi 2017).

Given that qualitative research can feature experts as well as the target communities themselves, it is of primary importance for the perceptions of the former to be validated by the stories of the latter, especially when dealing with a socioeconomic issue that affects people and affects them differently. This is rarely done as, in most cases, researchers stick to either expert views or to interviews with the impacted communities (Von Soest 2022). When it is done, the process can also operate the other way around (expert opinions validate people's sufferings) (Döringer 2020).

Ethnographic studies with vulnerable groups (whether in the form of interviews, field observations, or informal conversations, etc.), to address important topics such as social protection reforms, often generate barriers that need to be broken down. The first is the language barrier between the field researchers and the interviewees, not only in terms of using English instead of Arabic but also using a lexicon and jargon that researched communities do not understand. Moreover, in many cases, vulnerable groups, especially those living in remote areas, lack digital and financial literacy as well as access to finance, to the internet, and to digital tools (Yakubi, Basuki and Purwono 2019). This prevents researchers from fully reaching these groups, compensating them (in the case of remunerated interviews), and even formulating solutions for them to benefit from social protection programmes that require either digital literacy or financial literacy or both.

It could be argued that researchers and enumerators habitually display an 'elitist' attitude during their research endeavours (Lillie and Ayling 2021). It can also be intuitive to suppose that a Western or rich researcher may observe perfectly normal behaviour with respect to the researched community as different/distinct due to dissimilar social and cultural norms. On the other hand, the research subjects are not familiar with the culture of research. Instead, many of them have 'class hatred', and thus refuse to cooperate (or cooperate enough) with those trying to help them (Ntienjom Mbohou and Tomkinson 2022).

Vulnerable groups can hardly understand why privileged and educated people who do not share their grievances would be interested in documenting and understanding their realities or would be geared up to voice their demands and advocate for them. They can barely trust the researchers and practitioners approaching them solely to collect information, as they fear that they are either journalists or members of the national intelligence office. When trust is established, it is frequently because vulnerable people think the researchers are humanitarian organisations trying to assess their situation in order to provide them with aid (e.g. cash transfers, food assistance, in-kind donations, and water, sanitation, and hygiene (WASH) services). In this last case, interviewees tend to under-report their income, over-report their level of poverty/deprivation, and withhold information related to benefits they might be receiving from non-state actors, and so forth (Gengler *et al.* 2021).

Hela Yousfi (2021: 836) proposed the Egyptian term '*Fahlawa*' as 'a metaphor for better describing the challenges of a decolonizing research practice that privileges contestation and perpetual bricolage over formal and universal design'. The majority of the researchers who are aware of the challenges above use *Fahlawa* as a survival/resistance strategy. This technique has great potential but sometimes does not work and other times backfires. A young Egyptian field researcher in the domain of right to health mentioned during an interview with the author:

*No matter what we [the field researchers] do, no matter how we dress up, play it simple and modest, strip ourselves of valuable items, adapt our dialect, watch our language, etc., they [the research subjects] would still realise that we are different. And we would see traits of mistrust and betrayal feeling on their faces.*<sup>8</sup>

According to this researcher, the most asked question from targeted groups is 'Why?'. 'Why are you asking? Why do you want to help? Why this research?' Conspiracy theory is embedded in Arab cultures, especially among underprivileged Arab populations, and is mixed with a dislike of the 'well-off', the West, the White, and the different (Gray 2010).

These compounded cultural, economic, and security factors lead to mistrust on the part of the interviewees, which is sometimes justified according to a Tunisian researcher during an internal meeting.<sup>9</sup> She indicated that many researchers do not abide by research ethics codes, the media socially stigmatises vulnerable communities to a great extent, and many non-governmental organisations (NGOs) have been abusing these communities. On this last point, the Tunisian researcher elaborated that in some rural areas in Tunisia, old women began to produce small handmade crafts for outfits and home decoration and sell them as a form of economic resistance during the Covid-19 pandemic. International NGOs who were there to help them survive the health crisis were buying these products with the intention of supporting these women entrepreneurs and their small businesses. These entrepreneurs later discovered that, while they were selling their crafts at cheap prices, these NGOs were reselling them at significantly higher prices as 'oriental' items, without channelling any profits to them.

Disinformation as conveyed by the research subjects is not only the result of security fears, fears of social stigma, and the culture of humanitarian aid instead of that of research but it is also the result of mis-sampling. Just like micro-surveys, ethnographic studies have a strong propensity to look at households as units of observation, sometimes interviewing the whole family altogether (Guest, Namey and Mitchell 2013). Such a praxis is blind to the family power dynamics, who the head of the household/main breadwinner is, the spillover effect of one's opinion/input on others within the family, and so on, all of which lead to biased findings. Apart from the dynamics between researchers and research subjects, researchers are also operating in securitised public spaces and amid shrinking spaces for civil society and activists in most Arab countries. This limitation was exacerbated by the Covid-19 pandemic, especially in countries like Egypt and Jordan where the pandemic response was militarised.

Adding to the power dynamics with their employers, funders, or advisors as well, Arab researchers, like the majority of Southern researchers, are also subject to discrimination and oppressive power dynamics by their societies at large, hindering their ability to produce sound research at a constantly fast pace and impeding their participation in key research platforms, journals, and editorial teams/boards (Amarante and Zurbrigg 2022). Peer ethnography, among other forms of action research, has been suggested as an alternative that solves many of the aforementioned dilemmas. Nevertheless, effectively integrating vulnerable groups into action-based fieldwork has proved to be difficult in Arab contexts for the same reasons previously mentioned *vis-à-vis* cultural and social fragmentation, and the lack of trust between these groups and the researchers. A senior practitioner working with community-led initiatives and continuously collaborating with community-based researchers in

Jordan considers this to be one of the most harmful challenges of research and policy impact.<sup>10</sup> Knowing that bringing vulnerable groups together with experts and policymakers collectively would further widen the gap of concern, she believes that connecting the researchers and the practitioners would be a good compromise and promise a stronger impact.

### **3 Approaches, methodologies, and processes: what alternatives exist?**

The approaches, methodologies, and processes cutting across the depicted research methods can be summarised by the following points:

- 1 Colonial co-optation through funding mechanisms;
- 2 Research methods determining the type and quality of data instead of data determining the methods to be used;
- 3 Trade-offs within and between research methods;
- 4 Excluding what is not measurable;
- 5 Looking at a multidimensional development issue through a one-dimensional lens, with no integration of multidisciplinary research teams; and
- 6 Inability to integrate the impacted communities in the process or to fully capture their grievances.

The most flagrant trade-off that exists is that ethnographic research is perceived to lead to storytelling/anecdotal evidence that does not speak to the policymakers, who only look at quantitative data, although the latter does not fully capture the realities of vulnerable groups.

To overcome this stalemate, social actors should follow a mixed methods approach that allows for data triangulation, and for this approach to be possible, they should be ready to adopt a multidisciplinary methodology that combines social anthropology, sociology, and economics, according to Robert Chambers (Cornwall and Scoones 2022). This, in his opinion, would optimise the interaction between participatory research and (pre)established research. It would also offset the limitations, assumptions, inapplicable success stories/best practices, and lessons learned in desk reviews. The absence of e-government and open government aggravating this stalemate would also make a key entry point for alternatives and solutions. It would also turn the scattered efforts of data collection and analysis into a unified, systematic, and reliable data infrastructure that gets regularly and more frequently updated and that serves as a transparent directory for all.

Using quantitative and qualitative data properly once it is available solves another major part of the problem. For example, relying on inadequate and inaccurate numbers to run targeted social safety nets allows for the usage of the proxy means test (PMT) targeting methodology, which aims to predict a household's level of welfare and income using a statistical formula and proxy variables related to demographics, human capital, type of housing, durable goods, and productive assets – as typically used in household surveys. This methodology is used by governments, and financial and aid institutions to identify and target households who are eligible for these programmes.

However, it does not effectively address its main purpose of ensuring that the poorest members of society can access social protection. Instead, it contains built-in errors due to prediction algorithms capturing only 40–60 per cent of household income, imprecise proxies, poor survey quality, infrequent surveys, false information, and low coverage in the selected sample, thus excluding more than half of the targeted poorest households (including non-poor beneficiaries, and excluding poor non-beneficiaries) (Centre for Social Sciences Research and Action 2022; Sebastian *et al.* 2018). On a related note, the outliers we omit while cleaning numerical data sets sometimes represent those in dire need of assistance and those we should do our best to target.

The lack of data infrastructure we have outlined earlier in this section is the key driver of development actors towards this model of social protection: targeting programmes that are time-bound and do not constitute grounds for rights. This model, on the contrary, increases social tensions between beneficiaries and non-beneficiaries, and allows for political interference, especially in clientelistic and confessional contexts which are similar to Lebanon and Iraq (UNESCWA 2021c). Even worse, unlike the Progresas programme in Mexico, the Bolsa Familia programme in Brazil, and most Latin American programmes, social assistance programmes in the Arab region lack the necessary follow-up, review, and monitoring and evaluation processes, which would offer a systemic overview of the 'dos and don'ts' and the magnitude of the impact made.

When conducted, these processes are shallowly implemented, often using narrative reviews that reflect the social workers' strive for 'achievements'. While we have debunked the use of quantitative data/research to deal with social protection issues, we must now highlight the importance of quantitative impact evaluation identification strategies such as randomised control trials, difference in differences, regression discontinuities, and propensity score matching, which are still scarcely used in the Arab region. This is despite the fact that they are very precise in retrieving minimal but useful data points and are capable of establishing causalities between the interventions/treatments and the impact. Combining these strategies with rigorous



qualitative reviews can yield optimal results and assessments useful for improvement (Reed *et al.* 2021).

Thence, challenging Northern-dominated development paradigms should not be limited to blaming imperialism and capitalism for unequal opportunities to produce and access research, and for the commercialisation of knowledge through paywalls and intellectual property (IP) agreements. Rather, knowledge should be regarded as being a public good and should be shared accordingly. Social scientists working on the Arab region should consider how these paradigms continue to recreate colonial effects by imposing research methods and methodologies, and dictating what is right or wrong, good or bad. Researchers should not be afraid of following or letting go of 'mainstream' research techniques based on what they deem fit for the contexts they are examining. In the Arab region, researchers should remain conscious of the fact that socioeconomic policies, in particular, can be improved by tackling the inaptness of worldwide common research methodologies (including the lack of innovative and more inclusive qualitative tools). In addition, these policies can be improved by fighting the politico-economic structures that are deep-rooted in the way institutions – both public and private – operate within a domain of hierarchal, patriarchal linear systems nurturing the complexities of class and power dynamics (across the political regime, religions and sects, clans and tribes). It is the political economy of social policymaking that explains why data can be unreliable and, at the same time, valued as representing the facts in numbers, over and above those lived experiences on which social and economic change should be based.

#### **4 The way forward amid closed policy spaces**

This article has demonstrated the need to pursue participatory and emancipatory research that rationalises the challenges faced during the research process, in data collection, and in data analysis and interpretation. It stresses the need to follow a mixed methods multidisciplinary approach that enables the combination of credible action and quantitative research for optimum results. It invites social sciences researchers, especially those working on welfare programmes and policies, to name the politics of coloniality, be open to epistemological disruptions, and try to re-read and re-learn notions/conceptions which could break their hegemonic beliefs and praxis (Bartlett *et al.* 2007). These suggestions, laid out throughout the article, were inspired by Thambinathan and Kinsella's (2021) proposed framework of exercising critical reflexivity, practicing reciprocity and respect for self-determination, embracing 'other(ed)' ways of knowing, and embodying a transformative behaviour in research. This enables the willingness to experience new ways, experiment (scientifically) with new methods, accept the change, share results and build each other's capacity, in order to enact the ultimate knowledge production framework we call for.

On the other hand, we need to bear in mind that, once the research outputs are ready and their outcome policy recommendations are articulated, another major challenge needs to be faced in Arab countries, namely closed policy spheres characterised by illegitimate governments, political deadlocks, and/or political redlines determining who should (or should not) be included, thus excluding refugees, the lesbian, gay, bisexual, transgender, queer or questioning (LGBTQ+) community, and others. Social justice advocates will also encounter a policy inaction or, in other words, a 'no-policy' policy which emanates from a political will not to change and not only a lack of political will to change. This is part of the survival strategy of the ruling classes and an intention to induce social inertia among their people by keeping them busy making a living every day. This is also part of their intention to keep their clientelistic and confessional systems active, where they – through their parties and faith-based organisations – are the providers of social services instead of the state, thus increasing their constituency base by buying the votes of the beneficiaries (Achcar 2021).

Advocacy efforts will need to meet the political will of the engaged parties, legislative authorities, and systems of reference to knowledge and expertise, which are often not integrated in a reformist position on the hermeneutics affecting people's lives. This disintegration makes of advocacy a sometimes unhelpful strategy that does not respond to the logic of the security apparatus and the clergy bylaws, all of which continue to sideline the civic arena and ignore or make irrelevant the research findings that advocates refer to (World Bank 2013).

One way out of the impasse of closed policy spaces is mobilising young scholars and activists by equipping them with the knowledge (concepts, technical awareness, evidence-based sets of pragmatic policy recommendations, etc.) and the tools/tactics for activism, advocacy, and lobbying, which are key to creating demand-based/driven social movements and 'non-social movement social movements, or everyday social movements' around social protection that can make a change (Pourmokhtari 2015: 41). Such incremental movements have, according to Asef Bayat (2013), the ability to negotiate everyday wider spaces for citizens' preferences and choices, thus breaking the infrastructure of relational power that continues to serve the ruling triangle of forces in the Arab region: the security apparatus; dogmatism and political Islam; and tribalism and sectarianism.

Mobilising these movements is possible by conducting large-scale education and training programmes for these actors. This should be accompanied by efforts to bring to the fore the voice of poor/vulnerable people during scholarly discussions, activism deliberations, and knowledge translation endeavours. However, it is critical firstly to test the legitimacy of the policy recommendations ensuing from our research among the

concerned social groups themselves, given the lack of rule of law and culture of law in the region. For instance, do informal labour workers really want to be formalised? Many studies have proven their deliberate self-exclusion out of formal processes, and even social protection programmes, in order to avoid paying taxes or contributions, becoming subject to legal frameworks, and so forth (Dibeh, Fakhri and Marrouch 2019). More importantly, tremendous efforts should be exerted to educate vulnerable groups about the concepts and principles of social protection, as well as about their rights. This is essential for them to voice their demands directly and mobilise on a nationwide level, as a way to (partially) break closed policy spheres ahead of scholars and activists.

Finally, as previously explained in this article, bridging the gap between scientific research (including action research) and practitioner/policy research is a must. This requires a will to stop working in silos but rather bring together the researchers and the practitioners, and – to the extent possible – have vulnerable communities or their representatives represented in these convenings. It is equally important to replace the dry, technical, long-form research outputs with more accessible ones which serve as more hands-on policy-oriented informative outputs that are nevertheless evidence-based. Using tools such as infographics, quotes, and reportage videos, and benefiting from the remarkable proliferation of independent media outlets in the region is also key. At the same time, scrutinising the typology of research producers and consumers ('Who writes what?' 'Who reads what?') and ensuring the timeliness of the publication of the different research output formats ('What to publish when?') promises that our research will have a greater impact.

The author hopes that this article, by integrating a decolonial perspective and taking on board the lessons learned from research conducted during/on the Covid-19 pandemic, enables a departure from a normative form of knowledge production on social policy in the Arab region to a more genuine, homegrown, and engaged form.

### Notes

- \* This *IDS Bulletin* was produced as part of the Covid-19 Responses for Equity (CORE) Knowledge Translation Programme, led by the Institute of Development Studies (IDS), which supports the translation of knowledge emerging from the CORE initiative. Supported by the International Development Research Centre (IDRC), CORE brings together 20 projects to understand the socioeconomic impacts of the pandemic, improve existing responses, and generate better policy options for recovery. The research is being led by local researchers, universities, thinktanks, and civil society organisations across 42 countries in Africa, Asia, Latin America, and the Middle East. The views expressed herein are those of the authors and do not necessarily represent those of IDRC or its Board of

Governors, or IDS. For further information, please contact: [c19re.org](http://c19re.org).

- 1 Farah Al Shami, Senior Fellow, Arab Reform Initiative, France.
- 2 Global warming, drought, and pollution, among other consequences of climate change and environmental degradation, in addition to conflicts over transboundary water resources and the mismanagement of such resources, have all led to a global water crisis that spiked in summer 2022. This crisis materialises in scarcity of clean freshwater and safe drinking water in many European but also Arab countries, especially those where the Tigris, Euphrates, Nile, and other major rivers pass.
- 3 Professor of Economics at the Lebanese American University who has worked on many field survey studies, including the **SAHWA project 'Researching Arab Mediterranean Youth: Towards a New Social Contract'** in Lebanon, Algeria, Tunisia, Morocco, and Egypt. See the **Adnan Kassar School of Business** for more information on Walid Marrouch.
- 4 They do not take into account information that can only be captured qualitatively and are therefore blind to a large part of reality.
- 5 Author of the book *Development and Poverty: A Critical Review of Concepts and Measuring Tools* (Nehmeh 2021). See **Arab NGO Network for Development** for more information on Adib Nehmeh.
- 6 Key informant interview with Adib Nehmeh, Beirut, Lebanon, September 2022.
- 7 See Mandle (2015).
- 8 Tunis, Tunisia, September 2022.
- 9 Pers. comm., Beirut, Lebanon, June 2022.
- 10 Pers. comm., Amman, Jordan, November 2022.

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