

Chapter 2

Regional Indicators of Well-Being: The Case of France

Florence Jany-Catrice and Grégory Marlier

Abstract The Commission on the Measurement of Performance and Social Progress (Stiglitz et al. 2009) has usefully validated and, above all, given legitimacy to the various criticisms that have been made for several decades now of GDP and economic growth. What is a good society or a good territory? How is its quality of life or its well-being to be assessed? It once seemed that an economic approach to these questions, which are almost philosophical in nature, was broadly sufficient as a means of evaluating the dynamism of territories and, with even greater certainty, their quality. This consensus is being increasingly called into question as a result of a twofold pressure. There is a pressure exerted first by growing awareness of environmental issues, and, second, by increasingly heterogeneous populations. This heterogeneity leads to difficulties in adequately capturing living standards or well-being by ‘average’ measures (of income, consumption, wealth etc.), which have consequently lost some of their meaning (Stiglitz et al. 2009). They are increasingly being debated in international institutions (UNDP 2009; Giovannini et al. 2009), nations, territorial authorities (Jany-Catrice et al. 2009), and even municipalities (see eg. Bardet and Helluin 2010).

F. Jany-Catrice (✉)

Centre lillois d'études et de recherches sociologiques et économiques/Lille
Centre for Sociological and Economic Research and Studies, Paris, France

Institut universitaire de France, Paris, France

Faculté Sciences économiques et sociales, Université Lille1, Bât SH2, F. 59 655,
Villeneuve d'Ascq Cedex, Villeneuve-d'Ascq, France
e-mail: florence.jany-catrice@univ-lille1.fr

G. Marlier

Conseil Régional Nord-Pas de Calais, Direction du Développement Durable,
de la Prospective et de l'Evaluation
e-mail: Gregory.marlier@wanadoo.fr

What Indicators of Well-Being for Territories? The Case of France

Introduction

The Commission on the Measurement of Performance and Social Progress (Stiglitz et al. 2009) has usefully validated and, above all, given legitimacy to the various criticisms that have been made for several decades now of GDP and economic growth. What is a good society or a good territory? How is its quality of life or its well-being to be assessed? It once seemed that an economic approach to these questions, which are almost philosophical in nature,¹ was broadly sufficient as a means of evaluating the dynamism of territories and, with even greater certainty, their quality. This consensus is being increasingly called into question as a result of a twofold pressure. There is a pressure exerted first by growing awareness of environmental issues, and, second, by increasingly heterogeneous populations. This heterogeneity leads to difficulties in adequately capturing living standards or well-being by ‘average’ measures (of income, consumption, wealth etc.), which have consequently lost some of their meaning (Stiglitz et al. 2009). They are increasingly being debated in international institutions (UNDP 2009; Giovannini et al. 2009), nations, territorial authorities (Jany-Catrice et al. 2009), and even municipalities (see eg. Bardet and Helluin 2010).

Over the past 15 years, many initiatives have been launched with the aim of satisfying these needs for less conventional indicators. Nevertheless, most of these initiatives have taken the form of territorial diagnoses, whether of a general nature or focused on a particular sector or set of problems (poverty, inequalities, housing, etc.). Throughout the world, as part of an uncoordinated and disorderly trend towards the development of ‘community indicators’² (Cobb and Rixford 2004), territories³ (Jacksonville Community Council 2009) have embarked upon the process of developing dashboards of indicators of sustainable development, quality of life or, in some cases, of well-being (European Council 2005). In many cases, however, they have excluded synthetic or composite indicators from their projects.

The aim of this chapter is to present some innovative approaches that aim to put in place composite indicators of well-being or social health at various territorial levels.

Our hypothesis is based on the following premise. The purpose of most of these indicators is to supplement or replace GDP, not only as a collective measure of a territory’s wealth or well-being but also as an ‘instrument of government’ (Lascombes and Le Galès 2004). Therefore, it is necessary to analyse the results produced together with the institutional and/or socio-political conditions under which these composite indicators emerge and are socially validated. This is because our analytical framework is resolutely based on the ‘economics of conventions’

¹As is that of the *meaning* of life in society.

²See, for example, the Community Indicator Consortium (CIC), in the USA.

³‘Regions’, ‘departments’, communities or ‘municipalities’.

tradition developed in France by authors such as O. Favereau, A. Orléan and F. Eymard-Duvernay (Eymard-Duvernay 2006).

This framework is well-suited to report analyses whose purpose is to ‘quantify’ the social. It is the result of estimable pioneering work by Desrosières (1993) and has been further developed by Salais (2010). This quantification is the product of a twofold process. Its first stage is to agree on what one is seeking to measure, and the second is to carry out the measurement. It is because these two stages (reaching agreement and measuring) are *inextricably* linked that this chapter focuses on these two aspects of conceptualisation and measurement. Let us clarify. These indicators of wealth and well-being, which have developed over time, constitute socio-political agreements (or ‘conventions’) founded on three pillars. The first is a ‘cognitive’ pillar, namely the current state of knowledge. This state is itself retroactively influenced by the production of data, the performative nature of which has been widely documented in the social sciences (Messu 2003), more specifically in economics (Lebaron 2009). The second is a ‘power’ pillar. It takes account of the fact that political priorities are embodied in the data and are determined by power relations, by the legitimacy of the elite categories and by alliances and networks. The third and final pillar is technical in nature. It takes account of the choices made in the data gathering process (Turk 2009, p. 80), as well as of the methods of harmonisation, the production of nomenclatures and classifications, etc.

The chapter begins with an outline of the necessary conditions for the emergence of indicators that might be used in the regions to supplement or replace GDP. These social conditions make it necessary to analyse the processes whereby these new indicators might be legitimised. In developing the new indicators, after all, a balance has to be struck between two dynamics. On the one hand, there is a quest for legitimacy that is facilitated by a universal indicator.⁴ On the other hand, there is a need for the kind of legitimacy attained when the indicator is embedded in local specificities. This excludes any claim to universalism. This tension between universalism and localism – or singularity – is highlighted here for two paradoxical reasons. The first is that this tension is a way of expressing the power relations and power struggles (between expert disciplines, international organisations, countries etc.) that are implicitly contained in the indicators. This is particularly clear when the dominant actor, through the intermediary of the indicators, produces a *universal norm*. The second is that specific characteristics can also, when the necessary conditions are met, be translated into ‘radical politics with global ambitions’ (Smith 2000, p. 1152; Harvey 1996).

The new regional indicators also raise the question of the legitimacy of the process by which these indicators of well-being and wealth are constructed. Can or should that legitimacy be derived from academic expertise and science? From individuals? From citizens? This is the question that will be the main focus of the first part.

In the second part, we describe a French experiment which led to the construction of an indicator of social health for the French regions. We outline the

⁴See the widespread fame of the United Nations Development Program (UNDP)’s index of human development (IDH), despite its relative lack of sophistication.

approach – the conceptual presuppositions – as well as the results, with each of the indicator’s dimensions being analysed. The indicator’s sensitivity to various choices made is also tested; particularly its sensitivity to weightings, whose arbitrariness frequently attracts criticism.

In the final section, we question the possible uses of these “new technologies of government” (Lascoumes and Le Galès 2004). We will have analyzed that these new governance techniques, based on social or environmental values, have the ability to influence public opinion in different ways. They also have the ability to change modes of territorial governance, since they derive their legitimacy from a process of construction based on democratic decisions. These new indicators also give rise to alternative forms of benchmarking. These results upset the implicit hierarchy produced by the conventional economic indicators. We also explore the idea that this indicator, once extended by the addition of an economic dimension, like the UNDP’s IDH, could be of benefit to public action at regional level. It is particularly the case if it was to be used as one of the criteria for allocating regional aid within the European Union.

Conditions for the Emergence of New Indicators on a Sustainable Basis

*What Is Wealth*⁵

What points of reference are to be used in describing a territory’s wealth? “What entity, what objects, what segments of the real world should be considered in order to assess whether a society is progressing or declining, to judge whether or not it is wealthy and whether or not this wealth has increased?” (Méda and Jany-Catrice 2013). As D. Méda has clearly shown in her work on ‘*What is wealth?*’ (1999), Malthus published the *Principles of Political Economy* in 1820, the first chapter of which is given over to an attempt to define wealth. We cannot, he argues, ‘apply discussions respecting the relative increase in the wealth of different nations without having some means, however, rough, for estimating the amount of such increase’. This definition of wealth is absolutely the result of a value judgement that forms the basis for this definition (Fourquet 1981; Méda 1999). Méda also insists on the following fact. The ultimate objective was to enable nations to display their power and the first attempts at calculating national income in the seventeenth century were initially intended to measure the extent of that wealth in order to establish the tax base and give an idea of power. Nevertheless, what counted in the definition of wealth was certainly the possibility of displaying increases (Méda 1999). Thus only those elements that were *quantifiable* and whose *increase* could be easily tracked

⁵Méda (1999).

were going to be included in the definition of wealth. Furthermore – the aim was also to strengthen the emerging discipline of economics and to legitimise its ability to be the *science of measurement*. This way of conceptualising wealth and power provided the basis for the framework on which national accounting and its reference indicator, GDP, have developed. And territories have not been immune to this dominant representation of wealth and well-being.

New Initiatives for Measuring Wealth

As early as the 1940s, however, Simon Kuznetz had issued warnings about the misuses of this synthetic indicator if it was used as a proxy for well-being. With its *Limits to Growth*, The Club of Rome activated the debate in the early 1970s⁶ and a recent re-activation has started from the mid-1990s onwards (Gadrey and Jany-Catrice 2006). By confirming the limitations of the growth paradigm, the Stiglitz Commission provided further support for the experiments seeking to develop other indicators. This scientific support provided the needed legitimacy for, for example, elected representatives in local and regional authorities to tackle these subjects more easily. However that may be, a variety of new indicators has emerged over the past two decades, with the aim of assessing economic well-being (Osberg and Sharpe 2002), human development (UNDP 1990) or social health (Miringoff and Miringoff 1999). Local and regional authorities were actually among the first to launch new initiatives that sought to renew public action through the use of new indicators. This movement has sometimes been regarded as a revival of the movement that led to the first attempts to construct social indicators in the English-speaking countries in the 1920s (Cobb and Rixford 2004). The launch of Local Agendas 21⁷ in the wake of the 1992 Rio Summit probably also played a part in encouraging this movement.

These initiatives have to be viewed with a certain degree of circumspection. To what extent does the infatuation with indicators have its roots in a fashion for quantification, a form of ‘quantophobia’? With notions as fuzzy as ‘sustainable development’, ‘quality of life’ or ‘well-being’, the indicators themselves eventually come to embody the concept. This is not a recent phenomenon. Historically, the discipline of economics has conceptualised and defined wealth and progress in a particular way, and in conjunction with establishing the instruments of measurement. This approach has tended to develop in societies in which quantified arguments and, more specifically, ‘numbers’ frequently take on all the trappings of an incontestable argument. This specific argument becomes both resources and constraints for public action and citizens alike (Desrosières 1993).

⁶See also Nordhaus and Tobin (1971).

⁷Agenda 21 denotes a strategy for sustainable development first put forward at the 1992 Rio Summit.

What Political Conditions Must Be Fulfilled if These New Indicators Are to Have Legitimacy?

It took several decades for GDP to achieve a high level of domination and legitimacy in collective representations and judgements of what wealth is. In the current context, it might seem ambitious or unfeasible to construct new tools to supplement or even replace this indicator. By what means might new regional or national indicators conceivably acquire legitimacy and circulate before being gradually disseminated and appropriated by the actors? In studies that have addressed these questions, three modes of legitimation, which are not mutually exclusive, can be identified.

- Some are based on indicators that have been constructed by armchair experts and scientists. These experts are equipped with both their theoretical frame of reference and their value system, both of which play their part in providing ‘scientific’ legitimation for the choices made. Thus the report produced by the Stiglitz Commission (2009) is interesting on a twofold aspect. Firstly, in terms of the process of its production, as it is truly the fruit of work done in the comfort of its members’ own studies; secondly in terms of its results, as the Stiglitz-Sen’s Report can be interpreted as a series of proposals emanating from different schools of thought: Sen’s capabilities theory, the economics of well-being, theories of happiness. Their main protagonists were members of the Commission: D. Kanheman, A. Sen, T. Atkinson to mention only a few (Jany-Catrice and Méda 2010). In the same vein, the index of well-being recently divulged by OECD (2011) proceeds from the same technocrat and scientific legitimacy. Yet, the results are not neutral, and result from specific sociopolitical conventions.
- Others rely on the individual point of view, taking as a starting point the notion that the concepts to be measured are essentially too subjective to be objectified. Underpinned by a concept connected with individual preferences, these approaches base their measurements on subjective data gathered from individuals by questionnaire. Various methods are used, ranging from simple questions about individuals’ levels of ‘happiness’ to the construction of indexes of satisfaction with life. These variations are compared with changes in other objective variables in order to ascertain whether or not correlations can be observed (Easterlin 1974; Kahneman and Krueger 2006). Based on the premise that well-being is primarily a subjective concept, an approach of this kind is able to capture a statistically representative sample, the latter being the basis of its legitimacy. Thus surveys of this kind will produce datasets made up of individual perceptions of well-being. However, in promoting these approaches, it is seldom pointed out that they are essentially utilitarian and based on the individualism of ‘agents’. The notion of the common good is abandoned in favour of individual well-being, which agents are assumed to be keen to maximise. Relying solely on this type of subjectivist exploration may cause collective freedoms and social responsibilities to be overlooked (Sen 2004), despite the fact that they are part of the collective well-being. Similarly, there is a danger that the question of the preservation of common goods may be ignored in these approaches.

Table 2.1 The new indicators, their forms of legitimization and the corresponding worlds

Principal medium of legitimization	World of the expert	World of the individual	World of deliberative democracy
Actors in legitimization/values	A 'theoretical framework' (depending on the experts called on)	The utilitarian theoretical framework	Deliberative democracy
Processes used in choosing dimensions, variables, weightings etc.	Experts and technocrats /hierarchy of 'those in the know'	Individuals/methodological individualism	Citizens/democracy and communicational ethic
Basis of processus	'Armchair' work and deliberation among experts	Surveying and aggregation of individual preferences, both pre-existing and 'expressed'	Hybrid forums, cooperation on establishing priorities to guide the process of establishing common goods
	Objectification of expertise	Sublimated individual subjectivity	Political reality prioritised and policy objectives drawn up

Author's own table

- The third approach, whose work serves as a basis for what follows, takes as its starting point a notion of collective well-being that cannot be reduced to the sum of individual well-beings (Méda 2008). It also recognizes that there is a common natural and social heritage that is handed on to each generation and which has to be assessed and its evolution monitored (Méda 2008; Viveret 2008; Gadrey and Jany-Catrice 2006). The significance of the works promoted by these authors is that they do not separate internalist and conceptual questions from those that are more externalist in nature. In this approach, the favoured form for making collective decisions and social choices is the “forum” (Callon et al. 2003). In other words, open spaces for debate and discussion in which experts rub shoulders with civil society and great care is taken with the deliberative processes (Habermas 1992). These actors work together to take soundly based decisions following discussions on what constitutes ‘the territory’s wealth’ and ‘well-being for all’. Such approaches also seek to foster renewed forms of participatory democracy, such as those that have reached a high level of development through the work of the European Council (2005), for example.

The previous table summarises these various forms of legitimacy. Rooted in different ‘worlds’, their organising principles are a combination of process and outcome (Table 2.1).

Without wholly dismissing the other two approaches (work by experts and scientists, and the use of subjective indicators) as being of no value, the rest of this chapter will be concerned with the construction of indicators by hybrid forums. This is because our starting point is the notion that composite indicators embody shared values that progressive deliberations can help to formulate and quantify.⁸ We present a composite indicator of social health developed for the French regions according to these modalities.

A French Indicator of Social Health

The Genesis of the ISH for the French Regions

A ‘barometer of inequalities and poverty’, known as the Bip40, was constructed in 2002 by a network of campaigning researchers and trade unionists from across France. The composite indicator is made up of six major dimensions (housing, health, education, justice, work and employment and incomes), and 60 variables. In doing so, the indicator’s advocates were seeking to demonstrate that inequalities and poverty are not limited to monetary inequalities, as conventionally measured

⁸We are not concerned here with factor analyses. Although we believe that these geometrical analyses can be valuable in certain cases, the aim of our project is not to ‘make the data speak’ but rather to combine this composite indicator with an assumed vision of society (see Sect. 2.1).

through the economic poverty rate. The combination of 60 variables in a composite indicator can be regarded as the expression in condensed form of contemporary France's major social problems. This barometer shows that the major social problems in France today have got significantly worse over the last three decades, despite a small respite in the mid-1990s (Jany-Catrice 2008; Concialdi 2009).

A French region (Nord-Pas de Calais, 6 % of the French population) attempted to compile a variant of this barometer using the available data at a regional scale. The main value of this variant lays in the dynamic of its construction. The Regional Council and the researchers supporting it were concerned to have this approach validated by organised civil society. This led them to put together heterogeneous working groups whose members included experts, gatherers of social data at the various levels of the region, representatives of the regional authorities (the Region's technicians) and of voluntary associations. Many voluntary associations agreed to take part in the project, particularly because it gave them an opportunity to give expression to the complex realities they were observing, in some cases at a micro level in society.⁹ The project was not intended to start from a 'blank sheet', but rather progressed by iterative innovations:

Step A. Starting point: an object having acquired legitimacy and embodying certain values (UNDP's IHD at international level, the BiP40 at national level). In this experiment, the dimensions of the barometer of inequalities and poverty provided the basis for the initial debates and the preliminary positioning.¹⁰

Step B. Adaptation to the subjectivity of the working parties and their collective reflexivity (Turk 2009), within an atmosphere shaped by communicative ethics, in which all types of expertise can co-exist (Habermas 1992; Callon et al. 2003). This was the phase during which the hybrid forum deliberated on the region's 'social wealth' and its common social goods. These groups,¹¹ which worked together for the best part of a year,¹² interpreted the results obtained for each dimension of the barometer, debated the weightings and put forward proposals. In other words, this project's legitimacy was primarily procedural and based on the notion of citizenship. Nevertheless, one can reasonably take the view that the 'vision' conveyed by this indicator of social health is based on the concept of wealth put forward by A. Sen. For him, prosperity is a combination of (i) wealthiness (that is, the volume of goods and services that individuals can access), (ii) utility (that is, the use of those goods and services) and (iii) capabilities reflecting individuals' capacities for action.

Step C. Increasing collective awareness leading to the establishment of one or more common, limited priority objectives.

⁹The associations were involved in projects related to poverty ("Restau du Coeur", "Secours Populaire"), to housing inequalities ("Droit au Logement"), to gender inequalities ("CORIF"), etc.

¹⁰Therefore, the main reason for the coexistence of these dimensions is the genesis of the indicator and has not been thought as being to be justified by a factor analysis. See below.

¹¹More than 50 local actors took part in one or other of the debates.

¹²September 2007–June 2008.

What Vision of Society?

This approach was based on a form of communicative ethics and the debates sought to ensure the legitimacy of the process of constructing the new indicator. It led to the production of another indicator. This indicator is easier to handle because it is based on a limited battery of variables. It is also more readily diffusible because it constitutes a form of social benchmarking in which the French regions are compared with each other. It is known as the indicator of social health (ISH) and is based on an ‘assumed vision’ of society.¹³ This vision is similar to that produced by a broadly-based analysis of human needs, that is a vision in which human needs – ‘sentient creatures’ (Smith 2000, p. 1153) – include matters related to education, health, the preservation of social cohesion and social equality.

The process of constructing the indicator was not entirely free of the constraint imposed by data (non-) availability, with some of those involved having implicitly taken into account the sometimes severe lack of social data. Nevertheless, the determinants of the region’s social health were established at the end of the debates. They are as follows. As regards income: access to income for inhabitants that is not based on unsustainable inequalities, together with reasonable and equitable access to household consumption; as regards education, health and housing: access to housing for all, as well as access to healthcare and education; as regards work and employment, fair access to the labour market, in which jobs are of good quality; ability to defend workers’ collective interests.

Whereas the preceding dimensions were already sketched out, two new dimensions were added by project participants, namely safety and social ties. Thus contained within the ISH is the notion that social health must go hand in hand with an improvement in physical safety and consolidation of the interpersonal and social ties between citizens.

The Components of the Indicator of Social Health

The composite indicator that combines all these dimensions has two virtues. Firstly, it is relatively simple. Sixteen variables are used in its construction, which makes it less crude than the UNDP indicators but simpler than others. It also provides a basis for making comparisons between the French regions.¹⁴ Nevertheless, it does have some disadvantages. In particular, it is very dependent on data derived from

¹³In the sense that the quantitative data still embody political visions and may subsequently serve as collective points of reference.

¹⁴In its initial form, the national barometer of inequalities and poverty was difficult to regionalise and required the use of variables that do not all exist at this level of observation. In Nord-Pas de Calais, the coverage rate for social data is about 75 %. Cf. Jany-Catrice et al. 2009.

Table 2.2 The dimensions, sub-dimensions and variables of the indicator of social health

Dimension	Sub-dimension	Variables adopted	
Income	Consumption	Insolvency rate	
	Inequality and poverty	Wealth tax rate	Average liability per taxable household
	Poverty	Income poverty rate among under 17-year olds	
	Wages	Ratio of 9th to 1st decile of the standard of living by unity of consumption	
Work and employment	Unemployment	Unemployment rate	Difference between male and female unemployment rates
	Working conditions	Incidence of workplace accidents with working days lost	
	Precariousness/insecurity	Share of precarious/insecure employment	Part-time rate
	Industrial relations	Industrial dispute rate ^a	
Education		Share of economically active population without formal qualifications	Baccalaureate access rate
Health		Life expectancy at birth	
Housing		DALO rate	
Physical safety		Number of crimes against people and property per 100,000 inhabitants	
Bonds/ties	Social ties	Rate of membership of at least one association ^b	
	Interpersonal ties	Share of individuals who see friends and neighbours at least once a week	

^aThis variable has not been updated for 2008

^bThis variable as well as the “interpersonal ties” have not been updated by lack of data. The year 2004 has been chosen as the last year where data were available

administrative sources, since at this level of territorial division they are often the only available sources.¹⁵ Furthermore, some of the household surveys that were used need to be consolidated, because the regional sample is small (Table 2.2).

How can these variables be taken into account and their meaning interpreted in an indicator of social health? Let us look more closely at each variable by outlining, firstly, the reasons why they were selected and then presenting the results for the various French regions in 2008.

¹⁵Eg. The level of household over-indebtedness is taken from Bank of France data, the part-time rate is derived from firms' annual returns of social data, and so on.

The Income Dimension

The income dimension is made up of four sub-dimensions: consumption, inequalities, poverty and wages.

The idea of social justice conveyed by the indicator of social health reflects the territory's social cohesion and hence its ability to limit inequalities and poverty. The interdecile ratio of living standards, that is households' disposable income adjusted by the number of units of consumption,¹⁶ makes it possible to observe inequalities in household available income.¹⁷ This ratio shows that, in 2008, inequalities in living standards were greatest in the Ile de France ($D9/D1 = 3.4$) and smallest in Pays de la Loire and Brittany (respectively 2.8 and 2.9). After several decades of gradual reduction, however, the interdecile ratio of living standards has risen in the average France between 2004 and 2008, due in part to the greater concentration of income from personal assets.

With regard to consumption, a dimension that reflects capabilities, the variable adopted is the rate of insolvency. It serves as a proxy for budgetary constraints or even restrictions on consumption. A high rate of insolvency is one of the signs of great economic precarity in a territory, with the capacity to consume being in part illusory and fragile. The hitherto unpublished data made available to us by the Bank of France show that the number of cases treated for insolvency¹⁸ is three times greater in the most over-indebted region,¹⁹ than in the least over-indebted region (Corsica).

The rate of wealth tax,²⁰ on the other hand, is a measure of the very large fortunes in a territory. However, the highest rates of taxation do not necessarily equate to the highest sums paid by taxpayers, particularly because of the existence of threshold effects. Consequently, it was decided to use the rate of wealth tax combined with the average amount paid per household (see Table 2.3).

These economic inequalities calculated on the basis of the rate of wealth tax are supplemented by a poverty rate. Many researchers have shown that wealth is not the diametric opposite of poverty (Reddy and Pogge 2005). As regards poverty, the work groups favoured the poverty rate among children under 17 years of age²¹ as the

¹⁶Oxford scale.

¹⁷Here, a household's disposable income comprises earnings from employment, retirement pensions and unemployment benefit, income from personal assets, transfers from other households and social security benefits. Four direct taxes are taken into account: income tax, local tax, the so-called 'general social security contribution' (a supplementary social security contribution in aid of the underprivileged) and the contribution to the reduction of the social security debt.

¹⁸Number of applications filed per household. Data for 2004.

¹⁹Nord-Pas de Calais (555 cases for 100,000 inhabitants), followed by Upper Normandy and Picardy.

²⁰This is a progressive tax on the wealth of French households. It is paid by natural persons and couples whose net fortunes, in 2008, exceeded 770,000 Euros.

²¹The national poverty threshold, set up at 60 % of the median revenue, was at 950 Euros per month in 2008.

Table 2.3 Share of households liable to pay wealth tax and the level of tax paid, 2008

	Share of households paying wealth : ratio between the number of taxable cases and the number of households (in %)	Amount of tax paid By household in Euros
Alsace	1.36	90.1
Aquitaine	1.78	108.9
Auvergne	1.19	69.3
Lower Normandy	1.36	77.4
Burgundy	1.34	71.5
Brittany	1.56	84.6
Centre	1.56	88.4
Champagne-Ardenne	1.45	79.3
Corsica	0.95	70.5
Franche-Comté	0.89	45.7
Upper Normandy	1.36	71.8
Ile de France	4.32	430.2
Languedoc	1.40	72.8
Limousin	1.11	70.2
Lorraine	0.90	59.2
Midi-Pyrénées	1.39	79.5
Nord-Pas de Calais	1.36	87.7
Pays de la Loire	1.60	93.8
Picardy	1.46	91.2
Poitou-Charentes	1.50	79.4
PACA	2.64	161.6
Rhône-Alpes	2.14	126.2
Metropolitan France	2.11	156.8

variable to be adopted. The data indicate that the child poverty rate in France is 17.4 %. The situation is deteriorating rapidly, since this represents an increase of 1 percentage point in only 4 years. There are also very considerable variations around this national average, from 12.5 % in Brittany to 25.1 % in Nord-Pas de Calais (Fig. 2.1).

The Work and Employment Dimension

The work and employment dimension also directly reflects capabilities. In order to take account of the variety of working and employment conditions in the territories, the unemployment rate is adjusted for differences in the rate between men and women. In 2008, this 'adjusted' unemployment rate, which averages 8.5 % for France as a whole, varies from 6.6 % in Limousin to 12.3 % in Languedoc-Roussillon. Working conditions, for their part, are summarised by the incidence of workplace accidents with working days lost. This composite indicator varies considerably from region to region. In 2006, the rate for the Ile de France region was 21.2 for 1,000 wage-earners,

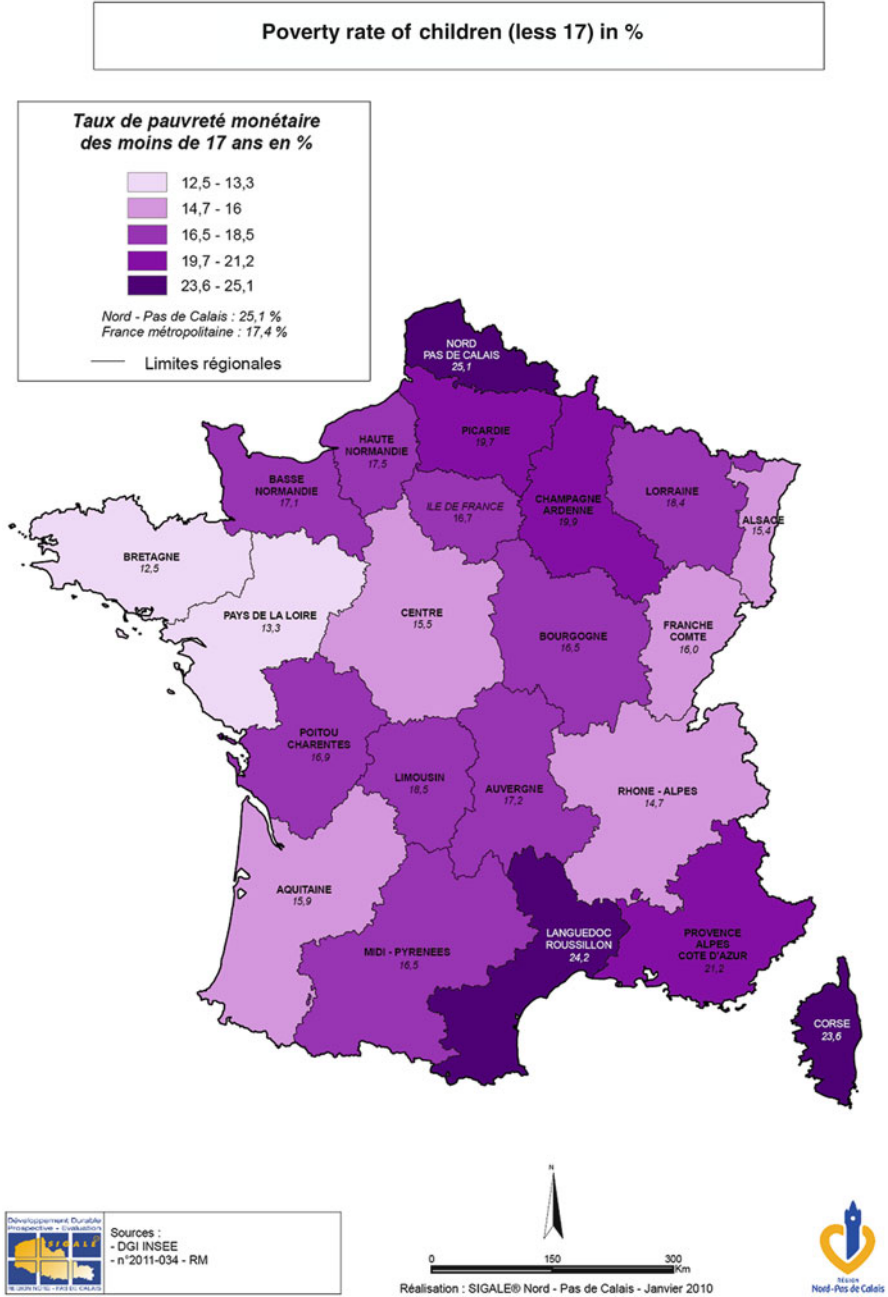


Fig. 2.1 Share of children living in a household whose standard of living is below the poverty threshold (2007 in %)

but as high as 36.9 % for Picardie. Job insecurity is expressed by an indicator of ‘precarity’ that combines the rate of temporary agency work with the share of fixed-term employment contracts. According to these figures, job insecurity is lowest in Corsica and the Ile de France (a bit lower than 12 % according to our national statistics, in 2008). It is highest in Languedoc-Roussillon, Nord-Pas de Calais, and Haute-Normandie, where it is higher than 14 %. This indicator is supplemented by the part-time rate, as a measure of the precariousness of women’s employment.

Industrial relations, finally, are evaluated by taking as a yardstick the rate of industrial disputes. Interpretation of the variation observed is based on the work of A-O Hirschmann (1970): labour disputes are an indication that workers have the possibility both of safeguarding part of their economic security and of forming work groups and establishing an occupational identity.

Education, Health and Housing

Education is another dimension of capabilities. The ideal here would have been to have access to data on the number of young people leaving the education system without qualifications. This is, after all, the variable which, in the debates, was unanimously acknowledged as the most appropriate for shedding light on the state of a territory’s human capital. Unfortunately, the regional educational authorities are very reluctant to make the figures available except on a very restricted basis. They are obviously highly sensitive, since they somehow reflect the performance of the state education system, whether good or bad. We opted for a combination of two rates: the share of the population without formal qualifications (stock variable) and the rate of access to the *baccalauréat* (flow variable) (Table 2.4).

Educational levels in France vary considerably from region to region. Almost 15 percentage points separate Brittany from Picardy in terms of access to the *baccalauréat* and hence to university. Similarly, there is a gap of almost 10 percentage points between these same two regions in terms of those without qualifications. More than a third of the population of Picardy have no formal qualifications (36.5 %), compared with less than 28 % of the population in Brittany.

Life expectancy is the indicator adopted for health.²² In 2008, there was a gap of almost 4 years between the highest life expectancy (81.9 years in the Ile de France and the Rhône Alpes region) and the lowest (78.2 years in Nord-Pas de Calais). Among the regions with the lowest life expectancies are, notably, all the regions of Northern France (east and west).

In the case of housing, the eviction rate was selected as the indicator, since it reflects the very greatest poverty: the lower this rate falls, the better social health becomes. In 2004, the last year for which data are available, the eviction rate was highest in the Ile de France (12.9 per 10,000 inhabitants) as well as, more

²²This variable had also been chosen for the UNDP’s Index of Human Development.

Table 2.4 Rate of access to baccalaureate and share of population without formal qualifications, 2008 (in %)

	Rate of access to baccalaureate per age cohort (2008)	Share of population without formal qualifications (2008)
	(%)	(%)
Alsace	28.8	61.9
Aquitaine	28.7	64.2
Auvergne	31.5	64.4
Lower Normandy	35.7	64.0
Burgundy	33.8	64.6
Brittany	27.8	71.8
Centre	33.0	63.4
Champagne-Ardenne	36.4	60.9
Corsica	33.0	62.3
Franche-Comté	32.9	65.3
Upper Normandy	34.7	63.7
Ile de France	25.2	65.9
Languedoc	30.7	59.9
Limousin	32.7	65.8
Lorraine	32.8	63.4
Midi-Pyrénées	28.2	62.3
Nord-Pas de Calais	34.3	58.6
Pays de la Loire	30.5	67.8
Picardy	36.5	58.5
Poitou-Charentes	33.4	64.8
PACA	29.9	62.1
Rhône-Alpes	28.6	64.7
France Metropolitan	30.2	63.8

surprisingly, Centre and Picardy (4.34 and 4.22 respectively). Among the regions with the lowest eviction rates were Limousin, Nord-Pas de Calais and Brittany (0.58, 0.64 and 0.96 per 10,000 inhabitants respectively). In the absence of these data for the 2008 ISH, we have chosen the rate of DALO,²³ that is to say the number of individuals that try to get enforceable housing rights, as implemented by a recent French housing policy. Unsurprisingly, it is in the Ile de France region that these cases are the most frequent. They represent one third of the cases presented to French Courts.

Physical Safety and Social Relations

A territory's social health requires a certain degree of peacefulness for its habitants. This is the reason for the inclusion of the physical safety dimension, which is

²³ « Droit au logement opposable », ie. enforceable housing rights.

summarised here by the number of ‘crimes and misdemeanours’ against people and property. The figure varies by a factor of three between the safest and least safe regions. Unsurprisingly, it is the highly urbanised regions, such as PACA and the Ile de France, that are the worst affected. Limousin and Auvergne are the best-performing regions in this regard, with very low crime rates of the order of 3,500 per 100,000 inhabitants, compared with 8,200 in PACA.

In order to take account of each region’s social ties, which constitute one of the forms of social ‘wealth’ in a territory, the share of individuals belonging to at least one association was chosen as a proxy. The results indicate that, between 2002 and 2004, it was regions such as the Auvergne, Rhône Alpes, Pays de la Loire and Alsace that had the highest rates of membership (approximately half of their populations). This social tie is supplemented by a tie summarised here by the share of “individuals who see their friends and neighbours at least once a week”. By this criterion, Corsica is the leading region (85 %), followed by Languedoc Roussillon (79.6 %). Three regions bring up the rear on 63 %: Upper Normandy, Alsace and the Île de France.

A Composite Indicator

We could have stopped there, as often happens in multi-dimensional approaches. On the contrary, however, we proceeded to enhance this multidimensional vision by aggregating the variables to form a composite indicator. This required a final stage of construction, in which weightings, and hence value judgments (OECD 2008²⁴), were allocated to each of the indicator’s dimensions. We are dwelling on this question at this point since it is very often seen as a controversial issue in the field (OECD 2001; Marcus et alii. 2008; Stiglitz et al. 2009; etc.).

Empirical Standardisation

Since the variables are in disparate units, a comparative standardisation procedure of the type used in the construction of the indicator of human development (UNDP 2009) was carried out. It seemed to us that the least arbitrary standardisation scale was empirical standardisation. In order to aggregate all the variables, it was decided to apply a simple average. The multidimensional composite indicator thus obtained ranges between 0 and 100 and is easy to interpret: the higher it is, the better a territory’s social health is in (implicit) comparison with the performance of the other regions. It is this composite indicator that is presented below. It is compared with the regions’ economic performance, represented here by gross disposable income (GDI) (Table 2.5).

²⁴“Regardless of which method is used, weights are essentially value judgments”, OECD, p. 33.

Table 2.5 Comparison of ISH and GDI per capita, 2008

Region	GDI per capita 2008	rang RDB	ISS 2008	Rang ISS
Île-de-France	24,139	1	48,2	17
Rhône-Alpes	20,312	2	61,8	7
Burgundy	20,142	3	57,7	13
Auvergne	20,118	4	65,9	4
Limousin	19,988	5	71,3	1
Centre	19,986	6	59,1	11
Alsace	19,740	7	65,6	5
Aquitaine	19,711	8	60,9	8
Provence-Alpes-Côte d'Azur	19,506	9	43,9	19
Midi-Pyrénées	19,296	10	62,1	6
Poitou-Charentes	19,246	11	59,5	10
Champagne-Ardenne	19,146	12	51,1	16
Lower-Normandie	19,142	13	58,0	12
Franche-Comté	19,130	14	60,5	9
Upper-Normandie	19,117	15	46,6	18
Pays de la Loire	19,078	16	66,3	3
Brittany	19,067	17	67,6	2
Lorraine	19,009	18	53,7	15
Picardy	18,760	19	38,4	21
Languedoc-Roussillon	18,216	20	42,5	20
Corsica	17,903	21	54,8	14
Nord - Pas-de-Calais	17,259	22	33,3	22
France métropolitaine	20,182		53,8	

This table shows that there are very few correlations in the spatial distribution of social health when it is compared with that of GDI per capita. The economically wealthy regions tend to be located in the centre, East and South-East, while the socially healthy regions tend to be in the *Grand-Ouest* of France (Brittany and the Pays de la Loire). In other words, the geographical distribution of economic wealth does not overlap precisely with the distribution of social health. Secondly, the Nord-Pas-de-Calais, Languedoc-Roussillon, Picardy and Provence-Alpes-Côte d'Azur (PACA) regions (which account for 21.6 % of the French population) have the lowest levels of social health compared with the other regions. The region that has by far the highest level of social health is Limousin.

Furthermore, it can be seen that the Ile de France, although an excellent performer in economic terms,²⁵ drops 16 places when classified in terms of social health and lies in the last quarter of the classification, between Champagne-Ardenne and Upper Normandy. The PACA region follows a similar trajectory, dropping 13 places depending on the classification criterion in use. In 9th place in terms of GDI, it slumps to 19th position in terms of social health. At the opposite extreme,

²⁵Its GDI per capital is 19 % greater than that of Rhône-Alpes, the region in second place.

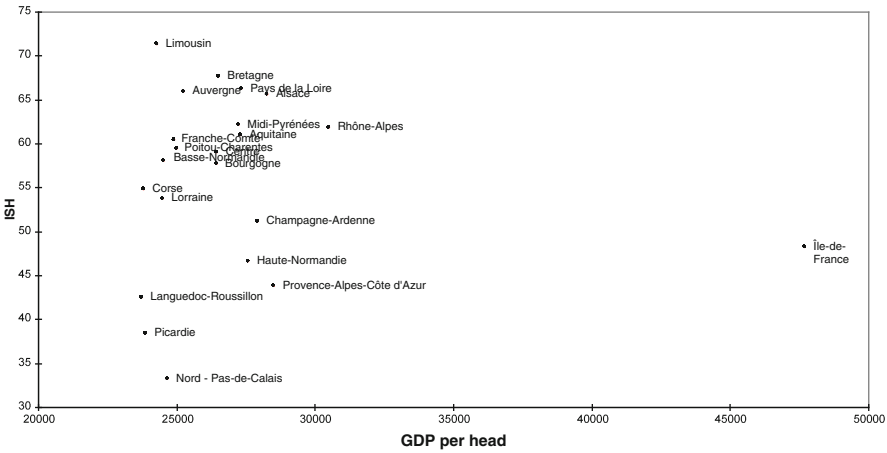


Fig. 2.2 The absence of a link between GDI per capita and ISH 2004

Brittany and the Pays de la Loire and, to a lesser extent, Franche Comté and Midi-Pyrénées perform significantly better in terms of the ISH than in terms of GDI per capita, gaining 15, 13, 5 and 4 places respectively. Limousin is in an exceptional situation, since according to the ISH it is by far the most ‘socially healthy’ of the French regions.

Languedoc-Roussillon and Nord-Pas de Calais are both at the bottom of this ranking. At the bottom of the classification in economic terms, neither of these regions manages to offset its lack of economic wealth with better social health, and remain both at the bottom of the ISH classification as well.

Absence of Link Between Economic Wealth and Social Wealth

There is no correlation between GDP per capita and the ISH²⁶ (see Fig. 2.2). In the French regions, in other words, a higher GDP (or GDI) per capita does not go hand in hand with a higher level of social health. This is in line with many studies that have shown that, beyond a certain threshold level of GDP/inhabitant (between 15,000 and 18,000 Euros per inhabitant), the correlations with variables of well-being (such as life expectancy) become blurred or even disappear altogether Alternatives Economiques (2011).

If we focus solely on the regions outside of the Ile de France, the correlations between GDP or GDI per capita and the ISH remain weakly or not at all significant.

²⁶ $R^2=0.000$. The relationship remains non-significant if the Ile de France is removed from the calculation ($R^2=0.054$).

This is either because collective social health is less directly correlated with individual well-being or because the dimensions selected²⁷ are different from those selected by the subjectivists.

The ISH's Insensitivity to the Choice of Weightings

The choice of the weightings to be allocated to the composite indicator is a sensitive one, since they may have significant effects on the results obtained. This issue is frequently ignored by researchers and academics on the pretext that the choices are purely arbitrary. Three arguments can be advanced to counter this recurrent criticism, which most of the time leads to abandonment of this type of method, or in some cases to non-transparent behaviours.²⁸

Firstly, at each stage of the process there are choices to be made with regard to both dimensions and variables. These choices are just as important as that of weightings to be allocated to the composite indicator, if not more so. Secondly, the arbitrariness can be partially eliminated if the choices made are the result of *shared conventions*. These conventions may emerge from debates, citizens' conferences etc. In short, there are possible political approaches to resolving the problem of arbitrariness. The third argument is more technical and follows the guidance provided by Saltelli et al. (2007). These authors state, in a preparatory study for the 2007 'Beyond GDP' conference organised by the European Unions, that 'it is desirable (...) to test how robust results are with respect to different aggregation procedures, (which) makes sensitivity analysis a fundamental step during the development of any composite indicator'.²⁹

The indicator of social health thus obtained and applied to the French regions shows that there is no correlation between levels of social health and levels of economic wealth as measured by GDP per inhabitant or by income. The wealthiest territories in economic terms, such as the Ile de France, are also classed among the 'poorest' when the ISH is the criterion. Conversely, some regions that are only average in terms of economic wealth have a high level of social health. This is the case with Western regions such as Brittany, Pays de la Loire and Limousin. This correlation, which is inversely proportional in some cases, is not observed everywhere. Thus certain economically poor regions also fare badly in terms of social health: this applies to Nord-Pas de Calais and Picardy.

²⁷Which in our construction, it will have been noted, are more objectified in nature.

²⁸Consideration of the uncertainty inherent in the development of a composite indicator is mentioned in very few studies (OECD 2008, p. 34).

²⁹We tested, quite openly, the effect of the change in weightings on the indicator of social health for the 22 French regions (ISH 2004). The ISH was calculated on the basis of equal weightings ($p=1$) for all 14 dimensions. The ISH indicator has been recalculated on the basis of 106 weightings fixed according to different cases. In the appendix, Fig. 2.3 (see Appendix) shows the variation in value of the ISH depending on the weighting allocated to the variables. The rectangles represent the dispersion around the mean for the various ISH values calculated for a given region. The vertical black lines indicate the minimum and maximum values reached by the ISH for each region.

This result also provides quantitative validation for the fact that the dominant economic indicators, which nevertheless seem still to be our sole defence even in times of crisis, are in fact contributing greatly to the erosion of social capital. We undoubtedly do not have the appropriate tools for estimating the extent of this erosion. This indicator of social health constitutes an advance in this direction, similar to what the Fordham Institute did for the USA in the 1990s (Miringoff and Miringoff 1999).

As a result, these indicators become multi-purpose tools. They serve, firstly, to raise individual and collective awareness of the social unsustainability of models of development based on growth alone. Secondly, they inevitably give rise to public debate. Once dissected and critiqued, they generate other shared conventions around what constitutes a territory's wealth and which aspects of that wealth we should value.

The ISHS[e] an Index Combining Social Health and Economic Wealth: A Possible Tool for Allocating EU Regional Aid?

From the ISH to the ISH[e]

The ISH has already acquired a certain degree of legitimacy in the French debate. It has been taken up by various mass-circulation newspapers, has been used by experts and researchers and is one of the indicators used in the Nord-Pas de Calais regional development plan. Furthermore, the Association *des régions de France*³⁰ has held this ISH as one of its three key indicators of context,³¹ complementary to the GDP.

To be used as a criterion for allocating funds (European funds, for example) necessitate combining it with an indicator of economic resources. After all, a low ISH combined with a high level of economic resources (as in the Ile de France) is not the same as a low ISH combined with a low level of economic resources (as in Nord-Pas de Calais, or Picardy). In the first case, the territory may well have difficulties in exploiting the economic resources at its disposal in a socially effective and efficient way. In the second case, it might plausibly be suggested that the territory does not have the resources to implement a policy for developing its multi-dimensional assets.

Consequently, drawing on the structure of the IDH (UNDP 1990), we have constructed an indicator based on the following data and known as the ISH[e].

$$\text{ISH}[e] = \alpha \text{ISH} + (1 - \alpha) \text{InGDI}$$

α is the weighting coefficient used for the combination of the two dimensions, social and economic. GDI is gross disposable income per inhabitant. This is favoured over GDP per capita since it takes account of inflows and outflows of resources produced at the regional level but is not necessarily confined to those

³⁰In which all the French regions are involved, in the institutional and public sense.

³¹Together with the Ecological Footprint, and the UNDP IDH.

Table 2.6 Comparison of the ISH and the ISH[e]

	ISH ranking	ISS[e] ranking
Alsace	5	3
Aquitaine	8	8
Auvergne	4	2
Lower Normandy	12	14
Burgundy	13	11
Brittany	2	4
Centre	11	10
Champagne-Ardenne	16	16
Corsica	14	17
Franche-Comté	9	12
Upper Normandy	18	18
Île-de-France	17	7
Languedoc-Roussillon	20	20
Limousin	1	1
Lorraine	15	15
Midi-Pyrénées	6	9
Nord-Pas-de-Calais	22	22
Pays de la Loire	3	6
Picardy	21	21
Poitou-Charentes	10	13
PACA	19	19
Rhône-Alpes	7	5

Data for 2008. Authors' calculations

resources. In the equation above, we have used the index of the log of that income.³² This was calculated using the empirical standardisation method.

Results

We applied this formula to the 2008 data and decided to use a weighting more favourable to the ISH, namely $\alpha = 80\%$.

The results for the ISH are shown below and are compared to the ISS[e] calculated by the method described above (Table 2.6).

Under these conditions, the criteria for allocating European structural funds could for instance be modified by taking account of the ISS[e] indicator. Nevertheless, the legitimacy of this combination still has to be verified, which has not been our purpose here. Our intention has been merely to show that the exercise was conceivable and to open the debates on the possibility to use these types of indicators in the allocation of economic aids.

³²The use of a function log means that the same increase of the household gross disposable income of the will weigh all the less on the value of the ISH that it leaves a high level of this variable.

Conclusion

In making our plea for the indicators to be taken up again in the public debate, we are not adopting a normative position. We are rather concerned with the legitimacy of the process whereby such tools are constructed relative to the direction taken by public policy. Our starting point is the observation made by sociologists of quantification as well as by political scientists that indicators are never neutral. They are the result of the choices, experimentation and debates that preceded and ran alongside their implementation. Indicators also embody a certain world view and the choices a society makes. This position is just as relevant in the case of territorial indicators. They are socio-political conventions that reveal a territory's capacity to maintain its prosperity as defined by A. Sen, a definition that includes access to goods and services, their use and capabilities.

Our work, which is experimental in nature, has sought to demonstrate that, when an objectified indicator is constructed on the basis of the soundly argued opinions of a panel of experts and citizens, there is no longer necessarily any correlation between the hegemonic indicators and the new constructions. This result may appear to be counter-intuitive if compared to those obtained by Pittau et al. (2010) and Beugeldijk and Van Schaik (2005) for the European regions. This suggests that research should be continued into the best ways of constructing indicators and into the need to link together two elements. On the one hand, a substantive definition of a territory's wealth, social justice and the progress for which they are a vehicle (Livingstone 2006); on the other, a definition of the measure to be used in assessing them. Should we rely on individual subjectivity and preferences, on the coherence of theoretical models or on the ethics of the debate on how common assets should be defined (Ostrom 1990)?.

In paying particular attention to the democratic process whereby the indicators of wealth, well-being and progress were constructed, our aim has been to rehabilitate a notion of well-being or endogenous progress. We suggest by this term that progress should be the product of a shared and negotiated vision, to the detriment of an exogenous vision of tools of wealth and progress over which human factors no longer have any influence.

Under certain democratic conditions, this convention-based mode of construction may become both a 'regulative ideal', and an 'epistemological possibility' (Livingstone 2006).³³ It constitutes a 'regulative ideal' in the sense that the indicators set a goal, whether it is achieved or not. It is an epistemological possibility in the sense that the 'new indicators' open up spaces for debate as well as offering some respite from the dominant representations and assessments of wealth and progress. 'It means that, however, circumstanced and parsimonious our use of the term (progress), the ideal of situated progress remains fundamental to making the sort of judgments that mark us out as knowing and ethical beings' (Livingston 2006, p. 577). This takes us a long way, a very long way from automatic control by dominant indicators.

³³Livingston also mentions the ideas of an 'ethical aspiration' and of a 'local ambition'.

Appendix

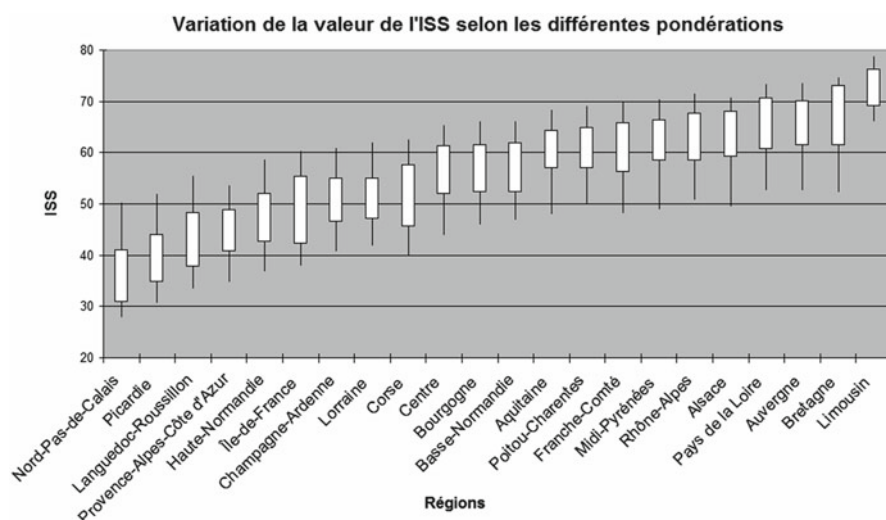


Fig. 2.3 Variation in value of the ISH depending on the weighting allocated to the variables (Source: Zotti 2010)

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Community Quality-of-Life Indicators: Best Cases VI

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