

Oxfam Cymru - Terms of Reference for Research

Doughnut Economics 2020

Closing date for applications: 23rd September 2019

Value of tender: £8,000

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1. Background and Rationale

Wales faces multiple and interlocking social challenges: deep inequalities in wealth and power, rising levels of in-work poverty and growing stigmatization of people living in poverty. Alongside these are environmental challenges on many fronts, not least the disproportionate size of the country's contribution to global climate change. Gains from growth in the economy have not been shared equitably enough. Around one in four people in Wales live in relative income poverty, according to the Office for National Statistics (ONS) and the High Pay Commission reports that inequality in the UK is heading towards levels last seen in Victorian times. Over the last four decades economic change has been marked by the continued decline of skilled and semi-skilled jobs and the relative growth of low skilled service sector jobs, leading to increasingly insecure work – compounded by many jobs in Wales being chronically low-paid. Such shifts have contributed to the sustained or deepening disparities in areas such as education, income and life expectancy. At the same time, Wales contributes significantly to the pressures brought to bear on the planet's bio-physical capacities.

The world and Wales therefore face twin challenges: delivering a decent standard of living for everyone, whilst living within our environmental limits.

The Oxfam Doughnut model visually demonstrates this twin challenge, showing that beyond the environmental ceiling lies unacceptable environmental stress and beneath the social floor lies unacceptable human deprivation. Oxfam's Doughnut has gained strong international interest as an approach to understanding global development paths, informed by both social and environmental factors. The UN has shown interest in using it to feed into the post-2015 Sustainable Development Goals (SDGs) and a growing number of academics, NGOs, think tanks and governments are proposing to collect data on planetary boundaries and social floors in their own countries, creating a national 'Doughnut analysis' for each.

The Doughnut was developed in 2012 by Kate Raworth during her time at Oxfam, followed the work of Rockström and others in 2009 in their paper Planetary Boundaries: Exploring the Safe Operating Space for Humanity, (<https://ced.agro.uba.ar/gran-chaco/sites/default/files/pdf/sem6/Rockstorm%20et%20al%202009.pdf>) which highlighted the risk of crossing critical thresholds in the Earth's biophysical processes. They identified an environmental ceiling/environmental tipping points - beyond which vital Earth systems become unpredictable and/or unsafe.

11 domains were created for the original social foundation in Oxfam's Doughnut model (water, income, education, resilience, voice, jobs, energy, social equity, gender equality, health and food). These were drawn from governments' submissions to the Rio+20 conference. The selection criterion was that a minimum of 50 percent of the submissions from governments were included the priority area. Relevant indicators and data were then obtained from global databases and reports. The indicators focused on deprivation thresholds (such as the percentage of people below the poverty line) rather than nationwide outcomes (such as GDP per capita).

This combination of environmental ceiling (outer ring) and social floor (inner ring) became known as the Oxfam Doughnut model. The area between the outer and inner rings representing the safe and just space within which to exist' (Sayers, 2015)¹.

In 2015 Oxfam Cymru commissioned Cambium Advocacy to produce a Welsh Doughnut for Wales entitled: The Welsh Doughnut – A framework for environmental sustainability and social justice <https://policy-practice.oxfam.org.uk/publications/the-welsh-doughnut-a-framework-for-environmental-sustainability-and-social-justice-346207> to influence the passage of the Well Being of Future Generations Act and to show the picture within Wales.

'This Welsh Doughnut report built on the premise that domains, thresholds and indicators for the national social floors should reflect, as much as possible, the reality of life in that country, and should be derived from public dialogue, discussion and participation. However, resource constraints prevented a detailed consultation with the public and therefore secondary analysis of participatory research was undertaken within the proposed domains in Wales. The domains were also informed by the findings of the 'Wales We Want' consultation which the Welsh Government had undertaken as part of the passage of the Well Being of Future Generations Bill at the time. Much of the literature reviewed was based upon research into what people felt to be important aspects of their lives or life in general.

Based on the review of government input into Rio+20, the Oxfam workshop, the literature review and discussions with stakeholders and experts, a range of 12 domains was suggested for a Welsh Economic Doughnut: Connectivity; Crime; Education; Energy; Food Governance; Health; Housing; Income; Local environment; Sense of support; Work.

The picture painted by the Welsh Doughnut in 2015 was stark. It found that Wales significantly outstrips proposed boundaries in nearly all of the environmental domains identified: By 55 percent in terms of biodiversity loss (measured via decline in farmland birds); By 64 percent in terms of ocean health (measured via the percentage of UK fish harvested sustainably); By 250 percent in terms of land use change; By 410 percent in terms of climate change (measured by emission of MtCO₂/year). At the same time, the report found that inequalities in the distribution of Wales' wealth are causing deprivation across many indicators, as people find themselves out of work, unable to afford to heat their homes and forced to visit food banks or simply go without enough food. The Welsh Doughnut demonstrated that our current economic model is, in many ways, both environmentally unsafe and socially unjust. The report showed that: 26 percent of the adult population lack any formal qualification; 40 percent of households are in fuel poverty; 51 percent of people feel they have no say in what the government does and 16 percent of people access the natural environment less than once per week' (Sayers, 2015)². (Sayers, 2015)

We are seeking to replicate the Welsh Economic Doughnut for 2020; five years on since the introduction of the Well Being of Future Generations Act. Replicating the Doughnut for 2020 will give us an updated picture of the position within Wales from which to measure success of the implementation of the Act and to provide a benchmark from which to develop a coherent set of policy asks ahead of the election to the National Assembly for Wales in 2021.

The 2020 Welsh Economic Doughnut will also act as the launchpad for the work of a newly formed anti-poverty coalition in Wales. The anti-poverty coalition is chaired by Oxfam Cymru and its inaugural meeting was attended by over 15 organisations from across the social justice sector. The coalition has already put forward a number of indicators for each domain which could be used to provide up to date and relevant measurements for the refresh of the Welsh Doughnut for 2020. Partners in both the social justice and environmental sectors have also already committed to providing any disaggregated data which they hold.

¹ <https://oxfamilibrary.openrepository.com/bitstream/handle/10546/346207/rr-welsh-doughnut-environmental-sustainability-social-justice-270415-en.pdf;jsessionid=A7BA1029CF5933CB0C1E529D9B1492D7?sequence=7>

² <https://oxfamilibrary.openrepository.com/bitstream/handle/10546/346207/rr-welsh-doughnut-environmental-sustainability-social-justice-270415-en.pdf;jsessionid=A7BA1029CF5933CB0C1E529D9B1492D7?sequence=7>

We are therefore looking for an organisation, academic, or researcher to use these suggested domains and indicators to collate the available data and provide an updated Welsh Economic Doughnut 2020 report for the anti-poverty coalition.

The selected organisation, academic, or researcher will be responsible for:

- undertaking the necessary literature reviews
- assessing the viability of the suggested indicators for each domain
- working with coalition members to gather the required data sets
- analysing the publicly available disaggregated data sets
- producing a refresh of the Welsh Economic Doughnut report for 2020. The link to the previous doughnut report which we are seeking to replicate can be found here: <https://policy-practice.oxfam.org.uk/publications/the-welsh-doughnut-a-framework-for-environmental-sustainability-and-social-just-346207>
- liaising with Oxfam Cymru to finalise the report.

2. Audience and use of findings

- Wales' anti-poverty coalition – this is a newly formed coalition, established in 2019, which comprises of key organisations working in the social justice space within Wales. The revised Economic Doughnut will be the launchpad for the work of the coalition and will provide a benchmark from which to drive action and influence election manifestos of key political parties in Wales. It is hoped that this report can feed into ongoing policy debates and help spark new ones. The wealthy nations of the world are the winners in our current socio-economic model; while the poorest people, both globally and within wealthy nations, pay the price. By bringing social and environmental considerations together, a broader dialogue can be initiated between those working for social justice and those working for environmental justice – two inter-linked areas of policy and practice.
- Welsh Government – the revised Economic Doughnut will be used to call on the Welsh Government to take clear policy steps to ensure within Wales we are living within the safe and just space. It will also provide a useful tool for Welsh Government ministers and civil servants in articulating the current position within Wales; as far as we are aware there is no other document which brings together data across social and environmental domains in this way. The Doughnut model is a useful representation of what just and sustainable development might look like. It brings into one conceptual framework, the concerns of environmental sustainability and social justice, which are too often portrayed as competing rather than inter-related, aims. In short it acts as a barometer, measuring the sustainability of our development. In this sense there are obvious links to the Welsh Government's Well-Being of Future Generations Act. We hope to see some of the issues highlighted within the Welsh Doughnut, and the approach used, incorporated into the implementation of the legislation.
- Cross Party Group on Poverty – this group in the National Assembly for Wales will be interested in the findings of the Doughnut and the findings of the report will help shape the approach and future direction of its dialogue.
- Future Generations Commissioner – the Economic Doughnut for 2020 can be used to show the progress made in Wales since the introduction of the Future Generations Act five years ago. It will provide a snapshot of the current situation in Wales and a benchmark for our progress against the goals of the Act.
- Well Being Economy Alliance – the Well Being Economy Alliance is a global collaboration of organisations, alliances, movements and individuals - working together to change the economic system. They advocate a wellbeing economy: one that delivers human and ecological wellbeing and therefore their work is directly linked to the concept of the Economic Doughnut. They will therefore be interested in the picture within Wales and be able to promote the final report within their global networks.

- Wellbeing Economy Governments (WEGo) - this alliance seeks to promote the sharing of expertise and transferable policy practices among governments who have a shared ambition of delivering wellbeing through their economic approach. The Welsh Economic Doughnut 2020 could be used to engage with WEGo in order to influence Welsh Government to join.

3. Research objectives

- Reproduce the Welsh Economic Doughnut 2015 report for 2020.
- Provide an executive summary version of the report
- Determine the threshold for each domain
- Assess the viability of suggested indicators for each domain and decide on final indicator sets
- Work with anti-poverty coalition members to gather disaggregated data for a set of decided indicators
- Analyse collated data from members and publicly available data to produce a Welsh Economic Doughnut for 2020
- Provide a rationale explaining the method for the selection and use of data for each domain.

4. Research questions

- How should the indicators and thresholds within domains be selected?
- Are there sufficient data sets for the selected metrics?
- What is Wales performance against a range of environmental and social justice indicators?
- Are we living with the safe and just space for humanity?
- What progress, if any, has been made since the introduction of the Future Generations Act?
- Are we meeting the well being goals and objectives of the Future Generations Act in Wales?
- What has been the impact of Wales' economic model in terms of tackling poverty?
- Does Wales equitably manage its national natural resources and economic growth when taking account of planetary boundaries?
- What is Wales' 'natural resource budget' and are we living beyond it?
- How can Wales ensure food, water, energy and jobs for all in the future without degrading the resources on which our global and national wellbeing depends?

5. Suggested research methods

- Literature review
- Data analysis of relevant datasets including disaggregation of data
- Participatory research methods with members of the anti-poverty alliance

6. Challenges and Limitations

There are significant challenges regarding obtaining Welsh level data for a number of domains. In 2015 there was insufficient Welsh data sets available and as such we were forced to rely upon UK results. In addition, on some indicators results were not directly comparable with UK or Scotland. In particular, environmental data for Wales is limited. However, in the case of some e.g. land use change and fresh water use this is perhaps understandable as data sets are limited in general and methodologies uncertain.

The setting of thresholds beyond which it is unjust for people to fall clearly presents some difficulties. For example, in relation to income poverty the usual metric used is the 60 percent of median household income (HBAI). There are, of course, practical policy rationales for a threshold based on relative income: it is well understood, comparable

across countries and time, simple and recognizable, and linked to existing government targets. However, it is also rather arbitrary. It implies that people one point below the threshold are poor, while those one point above it are not. Moreover, it is only a relative measure and does not measure income adequacy. Similarly, as it measures income alone, it does not reflect the different financial stocks and resources or support that people have to help them cope. Nor does it necessarily account for varying need among different groups – for example, pensioners have different requirements to households with young children. The task of selecting indicators and thresholds does therefore create a range of challenges. It is important to acknowledge these challenges, as well as the threshold limitations. These have been the subject of a great deal of debate among academics, practitioners and policy makers for many years. We do not seek to ignore them, nor necessarily overcome them, but to explore and use the best available solutions in order to create a Doughnut model that can act as a barometer of Wales’ socio-economic model.

As different groups experience poverty and social exclusion differently, some level of data disaggregation will be required. Disaggregation should be undertaken across gender and levels of deprivation within the chosen domains where possible, however this is often limited. It is important to acknowledge that there are other distinctive experiences of poverty requiring tailored solutions across other social groups, defined in terms of factors such as ethnicity, age and physical and mental abilities, and in sub-national geographic areas.’ (Sayers, 2015) ³

7. Key sources and people to contact

Anti-poverty coalition members – contact details available upon request.

Other sources include but are not limited to:

- British Social Attitudes Survey <http://www.natcen.ac.uk/>
- Centre for Sustainable Energy <http://www.cse.org.uk/pages/resources/open-data/fuel-poverty-data>
- Department for Transport statistics
https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/49966/acs0108.csv/preview
- Equality and Human Rights Commission’s Equality Monitoring Framework
<http://www.equalityhumanrights.com/key-projects/equality-measurement-framework/Pseuk>
- European Health Expectancies <http://www.ehemu.eu/>
- Friends of the Earth Scotland Air Quality data <http://www.foe-scotland.org.uk/node/1740> (accessed June 2014)
- Joseph Rowntree Foundation http://www.jrf.org.uk/?gclid=CIWI_56D08MCFXQatAodBCgAyA
- Kate Raworth’s Doughnut Economics www.kateraworth.com
- Natural Resources Wales <http://naturalresourceswales.gov.uk/>
- National Survey for Wales <http://nationalsurveyforwales.co.uk>
- Office of National Statistics Measuring National Well-being Wheel
<http://www.ons.gov.uk/ons/interactive/well-being-wheel-of-measures/index.html>
- Oxford Consultants for Social Inclusion <http://www.ocsi.co.uk/news/2011/03/24/why-the-imd-is-still-important-in-the-open-data-age/>
- Passenger Focus <http://www.passengerfocus.org.uk/bus-passengers>
- Public Health Wales <http://www.publichealthwales.wales.nhs.uk/>
- Rio+ 20 <http://sustainabledevelopment.un.org/rio20.html>

³ <https://oxfamilibrary.openrepository.com/bitstream/handle/10546/346207/rr-welsh-doughnut-environmental-sustainability-social-justice-270415-en.pdf;jsessionid=A7BA1029CF5933CB0C1E529D9B1492D7?sequence=7>

- Shelter Housing Facts and Figures: Overcrowding

http://england.shelter.org.uk/campaigns/why_we_campaign/housing_facts_and_figures/subsection?section=overcrowding

- Stockholm Resilience Centre
<http://www.stockholmresilience.org/21/research/researchprogrammes/planetary-boundaries/planetary-boundaries/about-the-research/the-nine-planetaryboundaries.html>
- The Literacy Trust http://www.literacytrust.org.uk/adult_literacy/illiterate_adults_in_england
- The Poverty Site <http://www.poverty.org.uk/59/index.shtml>
- The Resolution Foundation <http://resolutionfoundation.org>
- Trussell Trust <http://www.trusselltrust.org/foodbank-projects>
- UK Air (Defra) <http://uk-air.defra.gov.uk/networks/>
- UK Ocean Acidification Research Programme (2013). <http://www.oceanacidification.org.uk/>
- Welsh Government (2014) 'The Wales We Want, National Conversation – Interim Report'.
<http://www.thewaleswewant.co.uk/interim-report>
- Welsh Government (2014) 'The Well-being of Future Generations (Wales) Bill'.
<http://wales.gov.uk/legislation/programme/assemblybills/future-generations/?lang=en>
- Welsh Government (2014) 'Welsh Index of Multiple Deprivation (WIMD)', <http://wales.gov.uk/statistics-and-research/welsh-index-multiple-deprivation/?lang=en>
- WHO <http://www.euro.who.int/en/health-topics/environment-and-health/air-quality/data-andstatistics> •
WHO (2013) <http://www.who.int/mediacentre/factsheets/fs313/en/>
- WWF infographic on UK virtual water
<http://www.theguardian.com/environment/interactive/2008/aug/19/water?guni=Article:in%20body%20link4>

8. Style and length of report

A report comprising of the following sections:

- Executive Summary
- Introduction
- The Doughnut Model: A 'safe' and 'just' operating space for humanity
- Methodology for developing a social floor
- Social floor results
- Rationale for social floor results
- Methodology for developing an environmental ceiling
- Environmental ceiling results
- Rationale for selection of environmental data
- Conclusions

Oxfam Cymru will be responsible for organising and funding the translation, design, and dissemination of the report.

9. Timetable

September 2019	Agree project plan and commence work
October 2019	Produce first draft

⁴ <https://oxfamilibrary.openrepository.com/bitstream/handle/10546/346207/rr-welsh-doughnut-environmental-sustainability-social-justice-270415-en.pdf;jsessionid=A7BA1029CF5933CB0C1E529D9B1492D7?sequence=7>

November 2019	Present first draft of the report to anti-poverty coalition and complete any amendments
December 2019	Present final report

10. Research Management

The budget for this project is £8,000. Please email proposals to Claire Cunliffe, Campaigns and Advocacy Manager, Oxfam Cymru – ccunliffe1@oxfam.org.uk. For an informal discussion please call Claire Cunliffe on 02922 678956. Written proposals must be submitted by email by 23rd September 2019

11. Qualifications and Experience required

An organisation or individual with extensive experience in producing influential reports, undertaking research analysis, policy development and data disaggregation and analysis.

Demonstrable strong knowledge of the policy context and operating environment within Wales, particularly in relation to social justice and environmental sectors.

Avoiding libel in research: Oxfam guidelines

British organizations are answerable in law courts in the UK and overseas for libel in research materials that are published:

- in the UK;
- in other countries;
- on the Internet.

These guidelines contain relevant information and research standards which all researchers should comply with in order to manage risk.

What is libel?

The publication of any statement that harms the reputation of another.

Who can claim for libel?

Any company or individual. In the UK, governments cannot claim for libel, though individuals within government can. In some countries the rules are wider and libel is used aggressively by governments to silence opposition. Oxfam policy is that allegations that can impact on staff security need to be cleared with the International programme.

What defences are there?

The truth of the allegation is a defence, but only if it can be proved. The below explains the kind of proof that would be needed. There may also be a defence of 'privilege', even if we cannot prove the allegation, but in order to succeed in this defence we need to show we have exercised due diligence. The below also sets out what due diligence researchers are required to take.

What evidence is required?

The evidence required varies depending on whether:

1) The information is primary research, i.e. the allegation is being directly made based on its own information, in which case you must hold the evidence; or

2) The information comes from secondary sources, i.e. the allegation is based on another organisation's research, e.g. a newspaper, in which case you need to be able to demonstrate that all reasonable efforts to establish the truth of the allegation have been made.

1) Primary research

Researchers must wherever possible provide evidence that could be relied upon in court. If that is not possible, they should indicate why it is not possible and what efforts have been made. For example:

Documents

Where possible, documents or copies of documents should be provided, together with the research report that they support. For example, if you allege that an arms dealer has flown a shipment of goods to an embargoed destination, do you have a copy of the flight documents? Or, if we have a copy of a fax giving information, can we identify who has sent it?

Interviews

If the allegation has come out of information given in an interview, the researcher must provide either the original interview notes, or a copy of these, or a note of the interview made as soon as possible after the event. The notes must be dated and signed by the interviewer.

Use of secondary sources

Where the researcher relies on secondary sources, whether newspaper articles, published or unpublished works, or document found on the Internet, the researcher must provide sufficient details of the secondary source to enable Oxfam to obtain a copy. In the case of a published book, this should include the name of the author and publisher, and if possible the ISBN number. In the case of a magazine article, the same information is required but with an ISSN number. In the case of an unpublished work, the researcher must either provide a copy of the work (this is preferable) or the means by which Oxfam can obtain one.

Internet sources

Where the source is on the Internet, the researcher must provide a copy of the downloaded page, which must be dated. This is particularly important as web pages can be taken down easily and without notice.

Allegations of criminal offences

If the researcher has included information in their report that a criminal offence has been committed, you should draw it to the project manager's attention. In some cases you or your organization may choose to refer the issue to the relevant authorities, e.g. money laundering, or breach of Customs & Excise rules. If you are going to use the allegation in a publication, evidence is particularly important.

Names of companies

When a company is named in a report, provide details of the company's full name and registration where possible, so that the wrong company is not identified by mistake. On one occasion the publication of a report was halted because the wrong initials had been used to identify a company, and another company with the same initials claimed that its reputation suffered by the false reference.

2) Secondary sources

In order to obtain the privilege defence, Oxfam needs evidence of the due diligence of the researcher in checking the secondary sources. Accordingly:

1. Where the source is more than one year old, the researcher must check whether the information is still valid, and confirm this has been done;
2. Where the source is a newspaper article, the researcher should email or telephone the newspaper to check whether the subject made any complaint and, if so, whether the newspaper published a retraction or correction. The researcher must provide a copy of any such exchange with the newspaper and, if it is in a telephone call, a dated and signed note of the conversation. These steps are essential to obtain the privilege defence. However, if the allegation has been repeated in several national newspapers, and is an undisputed matter of public record, this is not required

Names of individuals

If an individual is identified, further identifying information should be given where possible, e.g. address, occupation, workplace. Why? Because in one of the most famous libel cases a newspaper reported the name of a man jailed for bigamy. Unfortunately, there were two men with the same name living in the same town. The innocent one won libel damages against the newspaper.

Further advice

If you have concerns or queries about avoiding libel or a potentially libellous allegation in Oxfam's research, please contact research@oxfam.org.uk for further advice.

Guidelines for undertaking research with ethics

Any research must follow ethical principles and particular care must be taken when it involves people as participants or is likely to impact directly upon them. This section sets out *minimum* ethical standards required in *all* commissioned research. When context-specific and/or more detailed guidance is provided, researchers must adhere to the relevant protocols and demonstrate that they have done so.

The three principles of research ethics:

- **Respect:** The researcher must recognize the capacity and rights of all individuals to make their own choices and decisions, and their right to be treated with dignity;
- **Beneficence:** The researcher's primary goal must be to improve the lives of participants and protect their physical, mental and social well-being;
- **Justice:** The researcher must ensure that the benefits for participants are at least as great as the risks.

Putting the principles into practice

These principles need to be reflected in each stage of research including: designing research; selecting participants; gaining their consent; conducting the research; and using the research findings.

1. Designing research

- The research must be designed to reduce risks for participants and increase their possible benefits from its outcome.
- The research must be designed especially to protect vulnerable participants – for example, children or women workers in a garment factory.
- Questions for surveys and interviews should be respectful and phrased in culturally-appropriate language.

2. Selecting participants

- Participants should only be involved in research that has potentially some benefit for them. Possible outcomes, such as a safer society or better working conditions in the long-run, may be benefits if the individual participants consider them to be so. Some participants may feel a benefit simply from having the chance to tell their story. But it is up to them to decide whether or not this is so.
- No individual or group of participants should face more risks than benefits from participating. If the research has a higher risk than benefit for participants, then it should be redesigned to reduce those risks.

3. Gaining the consent of participants

Researchers must gain informed and voluntary consent before conducting research with participants. This means that the participants must:

- have the relevant information about what the research is;
- understand it, including the possible risks and benefits to themselves;
- be free to choose whether or not to participate, without inducement;
- give their consent, either written or verbal;
- have the right to withdraw from the research at any time.
- The depth of this consent-taking process will depend on the topic of research and the extent to which it could impact on the participants' lives.
- If research involves children (as defined by national law, or as those under 18) then their parents or guardians must also give consent. It is best to get their written consent, in (the rare) case of disputes later.
- Special care must be taken when seeking consent from vulnerable groups, for example prisoners.
- Researchers must ensure that no participants are forced to take part, for example by their employer, their parents, or by village elders.

4. Conducting the research

- Researchers should be qualified and/or trained for the task. They need to have good self-awareness and strong listening skills.

- Research should be conducted in places that are socially comfortable for the participant and where they are able to speak freely.
- If the participant has incurred direct financial costs for participating then they can be reimbursed, but they should not be paid to participate.
- The participants must be able to contact the researchers, either directly or through local partners.
- If a participant reports any serious adverse effects as a result of participating – such as losing their job, or being physically abused – then this must be reported to the project manager by the researcher.

5. Using the research findings

Participants in research should be told how the research findings are likely to be used (for example as part of a campaign). They must then be asked, and must be free to choose, whether or not:

- they can be quoted in materials;
- their real name can be used in materials;
- their photographic image and/or film of them (if taken) can be used in materials.

Their choices must be clearly recorded and always kept with their testimony and/or the relevant media.

If it is agreed that all or any part of a participant's testimony should be confidential then that commitment must be clearly recorded and respected. If the testimony is to be made anonymous, or used with a false name, make sure that any other identifying details are also changed.

Additional resources on research ethics

The standards in this guideline are based on the materials produced by FHI 360 (formerly Family Health International) for its Research Ethics Training Curriculum, which includes a free, online self-study course that takes 2-3 hours to complete. Although this focuses on health-related research, it is highly recommended for any social science researcher (see: <http://www.fhi360.org/en/RH/Training/trainmat/ethicscurr/index.htm>).

The Framework for Research Ethics (FRE), produced by the Economic and Social Research Council (ESRC), provides the basic standards for UK-funded social science research (for further information and a copy of the FRE see: <http://www.esrc.ac.uk/about-esrc/information/research-ethics.aspx>).

Further advice

If you have concerns or queries about particular ethical issues in Oxfam's research, please contact research@oxfam.org.uk for further advice.

12. Guidelines for documentation of research

- In order to use the research findings in publications and campaigns, you should provide full information and documentation of the sources used so that these can be substantiated
- The final report(s) must provide endnote references for all specific facts and statistics used.
- The report(s) must also include a bibliography of the major references used. **Please see the Oxfam Style Guide for guidance on reference formats.**
- Primary sources must be used wherever possible over secondary sources. For example, the researcher should reference a statistic to its original report, not where it is cited second-hand by a newspaper or website.
- If people have been interviewed in the course of the research, the interview notes should be submitted, signed and dated. If quantitative analysis has been done as part of the research, the raw data should be provided, and all steps of calculations shown, in relevant software.
- If Internet sources have been used, a printed out page from the website showing the cited facts and the date the page was viewed should be included with the documentation.
- It is important to have documented proof of the content, since web pages are often updated or removed.