



Shared values and deliberative valuation: Future directions



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ABSTRACT

Valuation that focuses only on individual values evades the substantial collective and intersubjective meanings, significance and value from ecosystems. Shared, plural and cultural values of ecosystems constitute a diffuse and interdisciplinary field of research, covering an area that links questions around value ontology, elicitation and aggregation with questions of participation, ethics, and social justice. Synthesising understanding from various contributions to this Special Issue of *Ecosystem Services*, and with a particular focus on deliberation and deliberative valuation, we discuss key findings and present 35 future research questions in eight topic areas: 1) the ontology of shared values; 2) the role of catalyst and conflict points; 3) shared values and cultural ecosystem services; 4) transcendental values; 5) the process and outcomes of deliberation; 6) deliberative monetary valuation; 7) value aggregation, meta-values and 'rules of the game'; and 8) integrating valuation methods. The results of this Special Issue and these key questions can help develop a more extensive evidence base to mature the area and develop environmental valuation into a more pluralistic, comprehensive, robust, legitimate and effective way of safeguarding ecosystems and their services for the future.

1. Introduction

Shared values are values that convey conceptions of the common good between people and are formed, expressed and assigned through social interactions. The term shared values, and related terms such as social values, shared social values, (socio)cultural values and plural values, have been used to indicate a variety of concepts that relate to a sense of importance transcending individual utility, and that express the multidimensionality of values (Kenter et al., 2015; 2014a, 2014b). Valuation that focuses only on individual values evades the substantial collective and intersubjective meanings, significance and value from ecosystems, while deliberation on shared values can help make

valuation more robust and enhance its legitimacy (Farber et al., 2002; Fish et al., 2011a; O'Neill, 2007; Kenter et al., 2016b). This is important because valuations that overlook these wider meanings may undermine the legitimacy of decisions based upon them. Indeed, in this journal some have argued that 'truly social valuation' of public policy alternatives is the 'next frontier' in environmental valuation, and that developing effective and credible techniques to achieve this is the greatest challenge facing ecological and environmental economics today (Parks and Gowdy, 2013).

Shared values particularly come into play in determining how we evaluate values across the plural ontological and ethical dimensions of value (Kenter, 2016b; ; Kenter et al., 2015; Lo, 2011; O'Neill et al.,

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2008; Sagoff, 1998). This Special Issue illustrates in diverse ways that the ethical, moral and justice dimensions of many environmental issues necessitate approaches that allow for the recognition and elicitation of shared, plural and cultural values (Irvine et al., 2016; Cooper et al., 2016; Everard et al., 2016; Raymond and Kenter, 2016; Edwards et al., 2016; Kenter, 2016b, 2016c; Kenter et al., 2016b; Orchard-Webb et al., 2016; Ranger et al., 2016). Key ethical concerns include: providing a space and opportunity for people to identify values that they may find difficult to articulate (e.g. spiritual, identity); recognising that some values cannot be traded without discussion and negotiation (e.g. the legal or felt rights of local people, intrinsic values of other species); and understanding that it is often difficult to isolate valuation from decision-making processes because people feel there are strong ethical or moral issues at stake that need to be debated (e.g. the justice of the process, fairness in the distribution of benefits or disbenefits, responsibility, and issues of sustainability and future generations).

This reflects dominant themes in environmental debates, which often revolve around a number of key issues, including: lack of trust in elected representatives (Gastil, 2002; Independent Panel on Forestry, 2011), feelings of powerlessness in the face of globalization (Kiely, 2004), the ethical and social impacts of an increase in certain aspects of technology (Everard et al., 2016), and a call for justice and equity in environmental decision-making (Economic and Social Research Council, 2000). While our focus is on the environment, many of the questions discussed here are also increasingly pertinent in other areas of public policy and evaluation. For example, in health valuation, contestation of instrumental, efficiency-based methods of health services valuation and allocation have given rise to nascent ‘communitarian’ approaches to health, drawing on deliberation of communal values (Cleary et al., 2011; Mooney et al., 2002).

Nonetheless, shared values have been under-investigated, leading to a lack of established conceptual and evaluative frameworks to guide their assessment (Bunse et al., 2015; Ives and Kendal, 2014; Kenter, 2016a; Kenter et al., 2015; Parks and Gowdy, 2013; Raymond et al., 2014; Irvine et al., 2016; Scholte et al., 2015). This Special Issue of *Ecosystem Services* addresses a breadth of topics associated with shared values and illustrates a wide range of methods for understanding and assessing them. This paper synthesises current understandings and provides future directions for research around shared values, and the role of deliberation in valuation processes, which is highlighted in this issue as a key way in which shared values can be formed and expressed.

Deliberation has been proposed both as an answer to methodological problems within monetary (and to a lesser degree non-monetary) valuation (Alvarez Farizo and Hanley, 2006; Alvarez Farizo et al., 2007; Bunse et al., 2015; Lienhoop and Hanley, 2006; Lienhoop and MacMillan, 2007; Raymond et al., 2014; Szabó, 2011; Urama and Hodge, 2006), as a means to bring in questions of fairness, justice and participation (O’Neill et al., 2008; Spash, 2008; Zografos and Howarth, 2010), and as an answer to theoretical critiques of economic appraisal that are based on assumptions of individual, commensurable, and consequentialist values (Hockley, 2014; Howarth and Wilson, 2006; Kenter, 2016a; Kenter, 2017; Irvine et al., 2016, O’Neill, 2007, 1996; Sagoff, 1998). While deliberative processes take place formally and informally, and individually and socially, we focus here on group-based deliberative processes that involve reflecting on and discussing values and information to form reasoned opinions (Kenter et al., 2016a). Group deliberation has been an important element in all the methodological approaches in the empirical studies in this Special Issue, and can be considered central to shared values approaches to valuing ecosystem services.

Although the terms shared, plural, social and cultural values may each emphasise somewhat different aspects of values (for an overview of terms see Kenter et al., 2015), for the sake of brevity we summarily refer to shared values or a shared values approach. A shared values approach can be defined as an approach that recognises a plurality of

values (ontologically, ethically, epistemologically) that are socially formed, both substantively and procedurally. In the introduction to this Special Issue of *Ecosystem Services*, Kenter (2016b) highlights six features of such an approach, which are reflected across the diverse papers in the issue: 1) axiological plurality; 2) the need for deliberation on these plural values to establish the common good; 3) the importance of institutional factors, such as the role of power, in such processes of value elicitation-formation; 4) the need to recognise and interpret cultural and institutional histories, place, identity and experience to understand values and contexts; 5) the inevitable subjectivity of valuations that arises from the complexity and contestedness of many environmental issues, because no valuation is ‘complete’ in its ability to encompass every aspect and dimension of value; and 6) the potential of valuations as new democratic spaces, bridging the divide between research and practice.

The Special Issue that this paper concludes originated in two work packages (Church et al., 2014: ‘Cultural Ecosystem Services’; and Kenter et al., 2014b: ‘Shared, Plural and Cultural Values’) of the UK National Ecosystem Assessment Follow-On (UK NEA, 2014), a substantial research programme that aimed to address key areas identified by the UK NEA (2011) as priorities for further development. After completion of the programme, a two-day workshop with UK NEA Follow-On co-investigators and authors across the papers in this Special Issue was held in March 2015 to sketch out future directions for research around shared values. Each participant initially presented their individual perspective, followed by open group deliberation and facilitated brainstorming and reflection exercises. This resulted in a gross list of research questions that was then distilled and refined to 35 questions across eight topic areas (Table 1) through online discussion. These areas are: 1) the ontology of shared values; 2) the role of catalyst and conflict points; 3) shared values and cultural ecosystem services; 4) transcendental values; 5) the process and outcomes of deliberation; 6) deliberative monetary valuation (DMV); 7) value aggregation, meta-values and ‘rules of the game’; 8) integrating valuation methods. The next section synthesises the outcomes of the workshop discussions with key material from papers across the Special Issue. We end with final reflections and conclusions.

2. Key findings and future directions

2.1. Ontology of shared, plural and cultural values

Reviews by Kenter et al. (2014b) and Irvine et al. (2016) demonstrate the wide variety of ways in which the fuzzy and overlapping terms ‘shared’, ‘social’, ‘plural’ and ‘cultural’ values have been used in the ecosystem services valuation and ecosystems management literature. To provide clarity in identification and assessment, Kenter et al. (2015) discriminated five *dimensions* of values: (i) the value concept; (ii) the value provider; (iii) the process used to elicit values; (iv) the scale of value; and (v) its intention (Fig. 1). The *value concept* dimension distinguishes transcendental values (our context-transcending principles and life goals), from contextual values and value indicators. *Value providers* include individuals, ad hoc groups (e.g. in deliberative valuation), communities, societies and cultures, providing individual, group, communal, societal and cultural values. Values may be deliberated or not, depending on the *process of elicitation*. The *scale* dimension discriminates whether values relate to individuals (e.g. individual willingness to pay [WTP]) or a societal scale (e.g. social willingness to pay), and the *intention* dimension differentiates self-from other-regarding values. The authors then identify seven main, non-mutually exclusive types of shared/social values, listed in Table 2: 1) transcendental values; 2) cultural and societal values; 3) communal values; 4) group values; 5) deliberated values; 6) other-regarding values; and 7) value to society. Shared values are then conceived of as ontologically plural in the sense of varying across the above dimensions and in that they may reflect different categories such as

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