INTRODUCTION TO DEVELOPMENT STUDIES

Only study guide for DVA1501

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ACRONYMS

AU	African Union
BRICS	Brazil, Russia, India, China and South Africa
COSATU	Congress of South African Trade Unions
ECOWAS	Economic Community of West African States
GDP	Gross Domestic Product
GNP	Gross National Product
HDI	Human Development Index
IMF	International Monetary Fund
MDGs	Millennium Development Goals
MNCs	Multinational corporations
NATO	North Atlantic Treaty Organisation
SADC	Southern African Development Community
SAPs	Structural Adjustment Programmes
SDGs	Sustainable Development Goals
TNCs	Transnational corporations
U5MR	Under 5 mortality rate
UN	United Nations
UNDP	United Nations Development Programme
UNEP	United Nations Environment Programme
UNESCO	United Nations Educational, Scientific and Cultural Organization
UNFPA	United Nations Population Fund
UN-Habitat	United Nations Human Settlements Programme
UNHCR	Office of the United Nations High Commissioner for Refugees
UNICEF	United Nations Children's Fund
UNIFEM	United Nations Development Fund for Women
US	United States
WHO	World Health Organization
WTO	World Trade Organisation

Introduction

1.1 WHAT IS THIS INTRODUCTION ALL ABOUT?

In this introduction, we, your lecturers, will

- introduce you to your study package
- describe other study sources or materials you can use
- explain some of the study skills you will need when doing Development Studies

In this introduction, as in all the study units in this study guide, we give you a list of outcomes. These outcomes will help you in the following ways:

- They tell you what you should be able to do by the time you get to the end of the study unit.
- They tell you what you will learn in the study unit.
- They indicate the most important issues in the study unit.

Outcomes therefore prepare you for what follows by telling you what you should focus on. The most important issues in a study unit are also known as the key issues or key ideas.

The outcomes for the introduction are given in the box below. Quickly read through the list of outcomes and think about the following questions:

1.2 OUTCOMES

After having read the introduction, you should be able to:

- explain what your study guide contains and how you should use it
- list at least nine kinds of source that could assist you in your studies

Now that you have read the outcomes, you may be feeling nervous because you cannot do all, or some, of the things we have listed. Stop! Do not worry! Remember that your outcomes are there to show you what you will be learning about in this unit. We do not expect you to know how to do any of these things until you have finished studying the pages that follow.

1.3 WHERE DOES THE STUDY GUIDE FIT INTO YOUR STUDY PACKAGE?

The study guide is an important part of your study package. When we designed and wrote the study guide, there were four main aims we wanted to achieve in teaching development.

We wanted to:

- help you to understand what development is
- show you how complicated the whole question of development is
- get you to think about development in a critical way
- show you that development should be lasting and that it needs to affect all aspects of our lives

To achieve these aims we divided the study guide into broad themes consisting of a number of smaller study units.

Here is a more detailed explanation of what each study unit usually contains:

- an introduction – explaining which main points and issues the unit covers to show you what knowledge, skills or attitudes you should gain from the unit and what you should be able to do with them
- content – giving you information about the topic of that unit; such information will include background information, key terms, definitions and descriptions, arguments and counter-arguments, advantages and disadvantages, explanations and examples
- activities – intended to help you become actively involved with your study material and your environment
- an outcome checklist – (at the end of each study unit) will help you to decide whether you have gained as much as possible from the study unit and the additional reading material (margin notes on the left-hand side of a page that provide definitions of words in the text that we have highlighted, and which you may not know, or may not understand straight away). You do not have to read the definitions if the highlighted word is one you know and understand.
- space on the left-hand side of each page where you can write notes or comments

You may be quite familiar and comfortable with the idea of an introduction, outcomes, content and a checklist. But what are activities? Why do we ask you to do activities? Why should you do them?

Activities are tasks that will:

- make learning more interesting
- help you to remember information better because you will be actively involved in learning-by-doing
- link theory and practice
- involve you in the search for answers
- acknowledge the fact that you are an adult learner and give you a chance to incorporate your own knowledge of developing communities into your study material
- motivate you because they will help you check your own progress
- help you to collect and arrange information that could be used in essay-type assignments
- give you a chance to think about interesting ideas and arguments that you may come across for the first time

To get back to an earlier question: Can you afford to ignore activities?

Well, what do you think? Can you?

As you work through a study unit, you will see that there are different symbols on the left-hand side of some pages. These symbols (which are called icons) tell you where the activities are and what kind of activity we are asking you to do. We have used the following icons:

This icon shows that you need to do some extra reading.

The pencil shows that you will have to write down ideas or information.

This shows that you will have to do some research on your own – either interview people or consult the internet.

This shows that you will need to think about something, such as a statement or question – in other words, you will need to reflect.

1.4 WHAT OTHER SOURCES OF INFORMATION DO YOU HAVE?

- A wide variety of sources will be available to you while doing Development Studies. Most of these are obvious ones to experienced Unisa students: study guides, tutorial letters, and Unisa's Bureau for Student Counselling and Career Guidance. Others may be less obvious. These include specialist journals, government policy documents and the popular media. Let us look briefly at the different sources:
- You will find that the study guide is probably your most important source because it will provide the broad framework for Development Studies.
- A second essential source is Tutorial Letter 101. This tutorial letter gives details about recommended reading material and contains your assignment questions for the year. Each assignment question will identify what you need to read in order to do the assignment and will tell you when it has to be submitted.
- A third important source which you may want to keep close at hand is Tutorial Letter DVAALLD/301. This tutorial letter is sent out to all learners who are doing Development Studies and explains how to go about answering essay-type assignments.
- Note that there is no prescribed book for DVA1501.
- Studying at Unisa requires specific reading and writing skills, perhaps more than is the case at residential universities. Very often students and lecturers communicate with one another in a second or even third language and not in their mother tongues. This, in itself, can lead to all kinds of difficulties. It may be that you find yourself experiencing problems with your studies, such as difficulties with expressing your thoughts clearly in writing, identifying key terms and key ideas in reading material, formulating a logically consistent argument to answer an assignment question or memorising material for the examination. If this happens, you will find it most useful to contact Unisa's Bureau for Student Counselling and Career Guidance. They have compiled numerous brochures on effective study methods and can give you good advice.
- Specialist and semi-popular journals provide yet another source of information and ideas. Development Studies publishes a journal called Africanus, which you can access via the library site. Two of the many research-based journals available in South Africa are Africa Insight (available from the Africa Institute of South Africa, which is located in Pretoria) and Development Southern Africa (available from the Development Bank of Southern Africa, located in Midrand). Your local bookshop or news agency may also stock journals such as West Africa, South and Africa Today.

- Development is a dynamic subject, which means it is constantly changing. This is especially true of development issues in South Africa. While the Growth, Employment and Redistribution policy (GEAR) and the Reconstruction and Development Programme (RDP) have been widely accepted as frameworks that will guide development in South Africa, the various government departments are all constantly in the process of devising policy. This is why government publications, such as White and Green Papers, can also be informative. Very often, the White Papers, which outlines the policies or background to bills, are available at the Office of the Government Printer, or from the ministries concerned. The same applies to Green Papers. These are government publications that are presented as discussion documents. They are aimed at stimulating debate and eliciting responses from all interested members of the public, before policy is finalised. When you read your newspaper, or listen to the news on radio or television, make a note of any reports about new policies that are being designed, or new bills that are being discussed in parliament and contact the government printer or the appropriate ministry to ask for a copy of the White or Green Paper.
- Because development is dynamic, issues of development and poverty usually get a lot of publicity. Newspapers often carry information on development issues all over the world. Try to read a newspaper at least once a week and keep a special lookout for articles dealing with development. If you have a radio or a television, go to the trouble of finding development-related programmes that you can listen to or watch.
- If you have access to the internet, you will find it worth your while to explore some of the development-related websites.

1.5 THE AIMS AND OUTCOMES OF DEVELOPMENT STUDIES

When we compiled the study guide, we had very specific aims in mind. Our aims are to

- help you to understand what development is
- show you how complicated the whole question of development is
- get you to think about development in a critical way
- show you that development should be lasting (i.e. sustainable) and that it needs to affect all aspects of our lives (i.e. be holistic)

Against the background of these aims, we want you to have achieved certain critical outcomes at the end of this module on Development Studies. These outcomes include the ability to

- understand and be sensitive to the needs of poor communities
- tackle development problems in a holistic manner
- promote the ideal and principles of sustainable development

At the beginning of each study unit we list the outcomes you should have mastered by the end of the study unit. We do this to help you understand which final or critical outcomes you have to reach. We hope that your studies in module, DVA1501, will help you to achieve the critical outcomes mentioned in the following statement of purpose.

To introduce you to

- integrated development problems such as education and health
- the role of the state in development
- policy approaches
- political and economic dynamics within states
- the role of development institutions
- the importance of participatory development and empowerment

1.6 THEMES COVERED IN DEVELOPMENT STUDIES

In the aims listed earlier, we use terms such as "complicated", "holistic" and "sustainable". You will often come across these and other development concepts when reading about problems of poverty.

For example, simply by reading the "Table of Contents" for this study guide, you will come across development terms such as: health, education, participation, empowerment, gender, culture, globalisation, trade and aid environment and poverty.

But what do all these terms mean?

How will they help us to develop the qualities employers are looking for in development workers?

All of these words, and all the other subject terms you will find in the study guides, are like pieces of a jigsaw puzzle. Part of the complexity of development lies in understanding the different pieces that make up the puzzle. You have to make sense of each piece on its own, but you also need to see that these separate pieces create a complex picture when you put them together. If you only look at one or two, or even five or six of the pieces, you will not be able to see the entire situation. So, you need to see the pieces in their broader context in order to see the whole development picture. This is what we mean when we talk about a holistic approach.

Today the ideal picture that most practitioners and academics in the field of development are working towards is that of sustainable development. A definition of sustainable development that has been widely quoted is that of the World Commission on Environment and Development (WCED 1987:46):

> [S]ustainable development is a process of change in which the exploitation of resources, the direction of investments, the orientation of technological development and institutional change are all in harmony and enhance both current and future potential to meet human needs and aspirations.

The main idea in this definition is that development should meet the needs of the present generation or population without compromising the ability of future generations or populations to meet their own needs. (Here, the word "compromising" means risking or endangering something. If you compromise your freedom, you do something which may take away some of your freedom.) The definition recognises that the resources of the world are limited. These resources include people, money, the natural environment (water, air, soil) and the man-made environment (physical infrastructure, such as roads and buildings, and institutions like universities, banks and governments).

If we accept that the ideal of sustainable development is at the centre of our studies in this course, then this ideal will also be at the centre of our overall picture of development. So, if sustainable development is one of the pieces of our development jigsaw puzzle, we would put that piece right in the middle – like this.

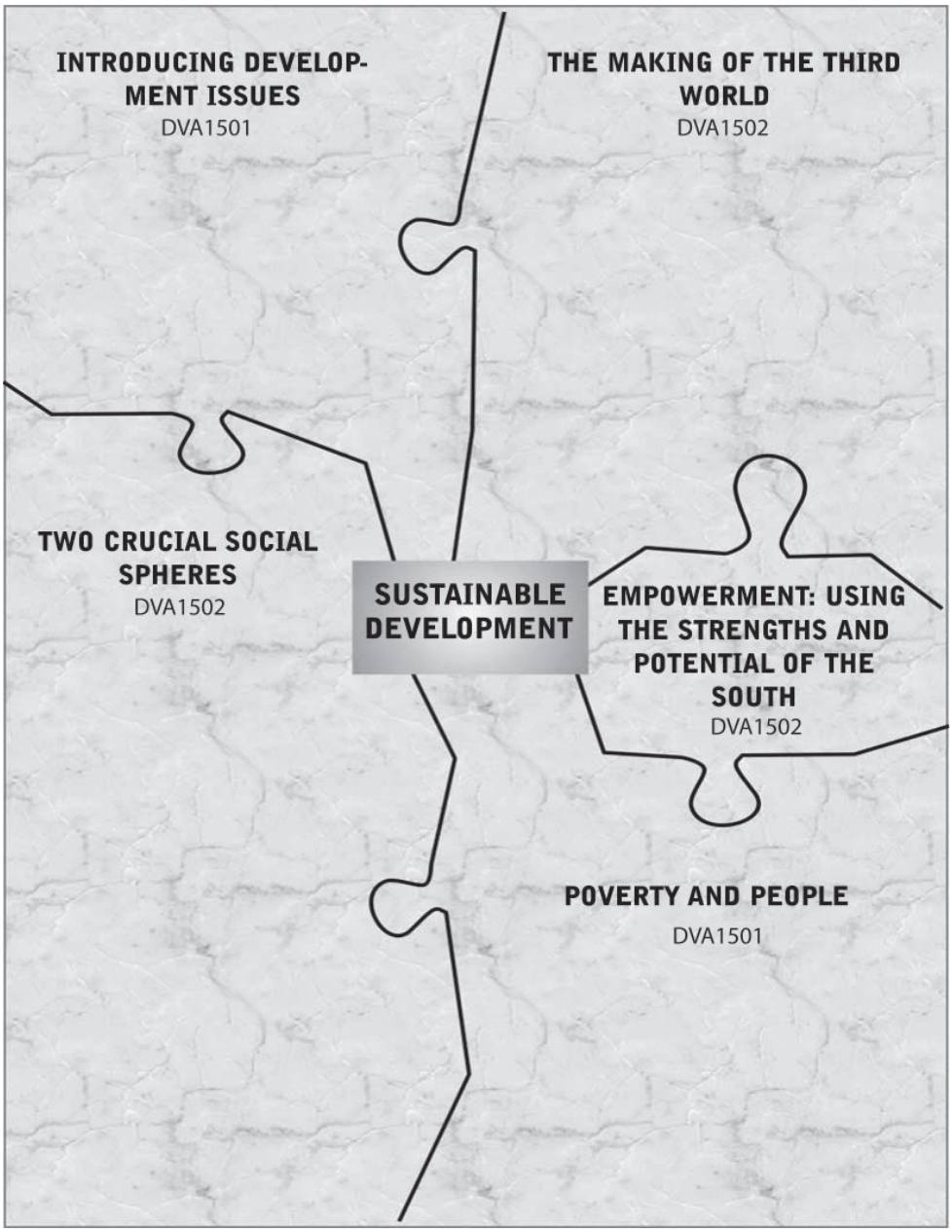


Figure 1

From this you can see that sustainable development is what our jigsaw puzzle picture is about. The next thing we need to do is to find the pieces that go around the outside of the picture – the border or frame of the picture – so that we know what else forms part of the picture. These outside pieces are the themes we are going to deal with in the two first-level modules, DVA1501 and DVA1502, and they are listed in the Tables of Contents of your study guides. We will cover five broad themes in these two modules. They are:

- introducing issues of development
- poverty and people

- health and education: two crucial social spheres
- empowerment: using the strengths and potential of the Third World
- contexts and agendas

Let us transfer these to our development puzzle.

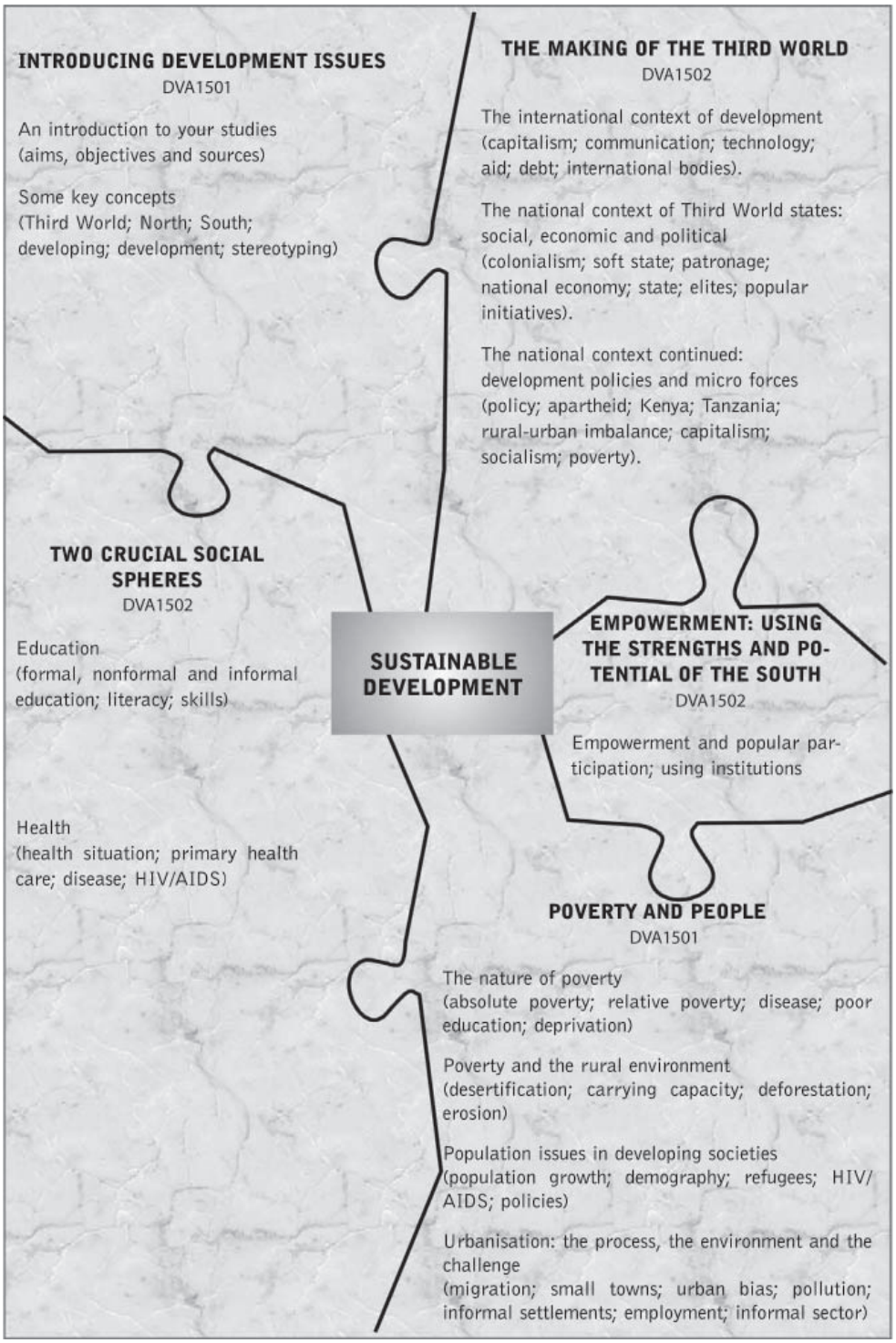


Figure 2

If you look at the tables of contents in the study guides for these two modules again, you will see that each of these themes is divided into a number of smaller sections called study units. We can now place the smaller pieces, or study units, inside the frameworks created by our themes.

As you start working through the study units, you will notice that in most of the units we follow a problem-centred approach. In other words, we explore a particular issue or a problem. As we have explained, it is important that we divide the broad field of development studies into smaller, more manageable sections. Once you understand these individual pieces of the puzzle, you will be in a position to start putting them together and working towards a holistic view of the development problem.

1.7 INTRODUCTION TO DVA1501

In the previous section, we showed you the five different themes that make up the two first- level modules in Development Studies. We also showed you how these themes fit together as different parts of the overall development puzzle. For you to pass DVA1501, you must be familiar with two core themes of the five. We introduced you to issues of development, poverty and people, justice and human rights, empowerment and participation.

In this module, we continue our overview of the developing world by studying:

- meaning, theories of development and sustainable development
- basic needs, justice, and human rights in development
- wealth, poverty and power

In the paragraphs that follow, we will introduce these five themes.

1.7.1 What is Development Studies?

Development Studies is a relatively new academic field of study. Its meaning remains open to interpretation as it encompasses many issues that concern human welfare.

One of our key aims is to introduce you to the dominant meanings of "development" as they developed before and after the Second World War.

The concept and meaning of development has changed over time. But, at the centre of development is the challenge of poverty that needs to be eradicated. Poverty is an opposite of development; it is an indicator of lack of development. Countries of the world are classified according to levels of development into those that belong to the First, Second and Third Worlds.

In study units 2 and 3, we take the meaning of development further. We look at what is called "sustainable development". The concept of sustainable development speaks to the issues of the relationship between development and environment as well as issues of climate change.

1.7.2 Basic needs, justice, human rights and development

This theme consists of two study units. In study unit 3, we introduce you to basic needs and development, that is, those needs that a person cannot do without such as shelter, clothes and water.

In study unit 4, we turn to justice and human rights as key aspects of development. Without justice and human rights, it is very hard for human beings to achieve their

basic needs. Injustice is identified as a major cause of lack of development. The presence of justice and human rights indicates a level of development.

1.7.3 Wealth, power and poverty

The last unit of this module is about wealth, power and poverty. It is important to engage with the puzzling questions of why some human being are wealthy, while others are poor and why some are powerful, while others are powerless. In this study unit, we still examine the practical, real world around us, but this time we try to explain which factors have helped to create wealthy people, poor people, powerful people and poverty itself.

We do this by looking at specific conditions or circumstances that have created mass poverty in the South. We also try to analyse those factors that have prevented development from taking place. We do this by examining some of the things that happen outside the boundaries of specific states that have a direct influence on development. Here we include measurements of inequality and poverty as well as the causes of poverty and inequality.

We hope you will find this module interesting and stimulating.

1.8 OUTCOMES CHECKLIST

We said earlier that you would find an outcome checklist at the end of each study unit. You have now worked through your first study unit for this module and the last thing you need to do, is to look at the list of questions and tasks set out below. The questions and tasks correspond with the outcomes we gave you at the beginning of this study unit. Decide how you want to complete the checklist. You may simply want to make sure that you can do everything we have listed without writing anything down. However, we think it is a good idea to write down your responses, because it is a better way of checking whether you can meet the outcomes and you can refer to your responses later, when you revise your tutorial matter.

Questions	Can do	Cannot do
(1) "The study guide forms the core of my tutorial matter." Explain why this statement is true.		
(2) List different kinds of sources you could consult or books you could read to increase your understanding of development issues.		

Study Unit 1

INTRODUCTION TO DEVELOPMENT STUDIES AND SOME KEY CONCEPTS

OUTCOMES

After completing this unit, you should be able to:

- explain how the concept of development has changed over time
- explain the origins and meanings of the terms "First World", "Second World" and "Third World"
- identify the advantages and disadvantages of using the terms "North" and "South"
- explain some dangers that are associated with stereotyping
- discuss the relative strengths and weaknesses of using statistical indicators to describe the state of development in a country

1.1 INTRODUCTION

Development Studies focuses on development and its opposite, poverty. The meaning of these concepts is influenced by the very values of the people who construct and use or abuse them. They are, therefore, not objective concepts per se, in other words, they do not have meanings of their own that nobody argues about, like the concepts used, for example, by mathematicians. Far from of being objective in their own right, the key concepts (such as "development" and "poverty") are subjective and their meanings depend on the values, interests and points of view of those who coined them or use or abuse them and, for this reason, they are value-laden.

Because they are value-laden, they are prone to contestations, because people's values vary across time, space and contexts. It follows that these concepts are not God-given, but are socially constructed by groups of people. It also means that, since people within and between social groupings are not always equal, it is possible that those who hold more power than others impose their subjective opinions and world views on those who are weak. Of course, we cannot expect the weak not to resist and contest the arrogance of the powerful, and there are instances where the voices of the weak are negotiated into the dominant perspectives which are considered mainstream.

In many instances, the voices of the weak tend to remain marginalised; thus, those who are powerful shape the destiny of these marginalised societies by imposing their vested interest on the meanings of the key concepts. This introductory section on the issues that may affect our attempts to construct concrete definitions of many of the key concepts in Development Studies indicates that scholars of development are faced with the challenge of terms that have changeable meanings.

However, the lack of concrete and stable definitions of key concepts in Development Studies does not mean that it is totally impossible for us to define any of the terms. Given the complexities that underpin the meanings of the key concepts in this field of study, we need to come up with strategies of developing profound responses to those questions that require us to define these terms. While it is possible that there

are many ways of dealing with unstable definitions of terms, one of the most useful approaches is to articulate what the dominant view (the view that is held by the majority of people or the most powerful people) says about each of the terms and how is it challenged by those who hold an alternative view. The other strategy is to historicise the meanings of the terms, tracing their origins and how the meanings of these terms have evolved (changed) over time up to today.

In this study unit, we use both strategies outlined above to clarify such terms as "First World", "Second World" and "Third World"; "North" and "South"; "developed" and "developing"; and "rich" and "poor". We examine the general characteristics of "developed" and "developing" countries to try and find out how these countries differ. We use various maps of the world, and of Africa, to help you understand these differences more clearly. We also look at the ways in which international organisations classify or group countries and some of the different indicators that are used to make this classification. We end this study unit by examining the meaning and evolution of the term "development".

1.2 THE DIFFERENCE BETWEEN "DEVELOPED" AND "DEVELOPING" COUNTRIES

When you read about or listen to the speeches of politicians, visiting heads of state and ambassadors or when you examine a policy document, you will find many references to

- developing and developed countries
- First World, Second World and Third World
- the North and the South
- rich countries and poor countries
- the "haves" and the "have-nots"

You probably use some of these terms yourself. But what do these phrases mean and who (or what) are they talking about?

You will find that the following countries are usually defined as "poor", "developing" or "Third World" countries: Somalia, Ethiopia, Burundi, Rwanda, Zimbabwe, Botswana, Lesotho, Angola, Mozambique, South Africa, Kenya, Tanzania, Democratic Republic of Congo, Zambia, Nicaragua, Peru, India and China. Note that the World Bank regards South Africa as an "upper middle-income country".

Many people classify these countries as belonging to the Third World, because they view them as having the following features: drought, famine, military coups or takeovers, genocide or mass murder, floods, earthquakes, mudslides, authoritarian rulers, dictatorships, large numbers of refugees, no regular elections or other democratic processes, corrupt civil servants, not enough jobs or houses, too many people, diseases such as malaria, tuberculosis and AIDS, and inhabitants who seem to be lazy and unwilling to change.

Again, many people list the following countries as "rich", "developed", or belonging to the "First World": United States of America, Britain, France, Germany, Australia, Switzerland, Canada and Japan.

Their reasons may be that they view them as having the following features: excellent infrastructure and communications; good housing; good education; enough jobs;

democracy; freedom of expression and association; industrialisation; high standards of living; many consumer goods such as cars, television sets and radios; modern ideas; people who are hard-working and competitive; and high productivity levels.

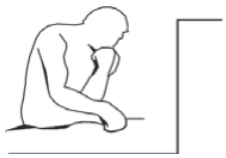
Now, if you look closely at many of the reasons that are put forward for classifying countries as "developed, "rich" or "First World" and others as "poor", "developing" or "Third World", you will realise that some countries are accorded a positive quality, while others are viewed in a negative light.

There is also a tendency to give a blanket label to a number of countries, as though they are similar in every respect.

What this means is that classifying countries as belonging to particular categories, such as "rich" or "First World" or "developing" or "Third World", can only tell us a part of the whole picture. For instance, not all people in developing or Third-World countries are poor, ill, corrupt, starving or helpless. Neither is everyone living in the First World rich.

In several instances, some of the characteristics used to classify countries according to "developing" versus "developed" states are stereotypical. Thus, for instance, it cannot possibly be true that all people living in countries viewed as "developing" are lazier and less clever than those in the developed world, merely because they live in a particular place. The realities of the circumstances that make the difference between the developing and developed worlds are much more complex than that.

For instance, most of the countries that constitute the developed world once colonised other countries, whereas many of those countries that are classified as "developing" have never colonised others. This can be a better explanation of the differences between the developed and developing world in economic standards and infrastructure than, say, the categories of "lazy" versus "hardworking" or "stupid" versus "clever".



Activity 1.1

Revisit the list of reasons for classifying countries as First World and Third World:

1. Identify at least three reasons on the list that you think are not true about the differences between the First World and the Third World.
2. Reflect on how the province or state in which you live is favourably or unfavourably described in the media.
3. Discuss whether this favourable or unfavourable description is meant to serve a particular interest.

As you will see in this study unit, there are various scientific ways of comparing the levels of development of different countries in order to distinguish between more developed and less developed countries. One of these indicators is the gross national product (GNP) of a country, which is the total value (in money) of its economic output (i.e. of all the things its people grow, make and sell). GNP is an indicator that is easy to identify and measure (Todaro 1994:680). However, when we distinguish among countries on the grounds of emotional images and generalisations, the indicators we are using are stereotypes – the one-sided, incomplete pictures we get when we ignore the complexities of development.

1.3 WHY SHOULD WE AVOID STEREOTYPING?

The United Nations Children's Fund (UNICEF 1992:22) explains why stereotyping should be avoided:

> [S]tereotyping harms all members of the world community. When certain groups are considered inferior, they are commonly denied their rights to education, employment opportunities, housing and safety. Perhaps the most insidious effect of stereotyping is that negative images shape the views that minorities have of themselves, further limiting their potential.

In other words, stereotyping has a negative effect on the countries and people about whom we think in a stereotyped, one-sided way. But, it also has a negative effect on those who hold such stereotyped views. UNICEF (1999:22) points out that these people "fail to understand their interdependence with other groups. Their biases rob them of the opportunities to share in the knowledge and experience of other cultures".

Stereotyping could also "lead to or aggravate conflict; when full humanity of a group of people is reduced to a few negative qualities, it becomes a simple matter to think of them as different from ourselves, as evil, as enemies – and thus violence against them can be rationalised" (UNICEF 1992:22–23). Think about slavery, colonialism and apartheid. Can you see that these conflicts and the inhuman behaviour of those involved were partly caused by greed and partly influenced by stereotyping others?

1.4 USING STATISTICS AND INDICATORS

People who write about development and organisations involved in the development field all use different indicators to explain development levels within specific states and to compare states. In this study unit, we focus on the gross national product (GNP), the gross domestic product (GDP), the death rate among children younger than 5 years (U5MR) and the Human Development Index (HDI). You need to understand both the advantages and disadvantages of using development indicators in the classification of countries.

Reading Box 1.1 gives you background on the GDP and the GNP as indicators of development. In recent years, the gross national income (GNI) has become preferable above the GDP and the GNI, because the latter two indicators could not account for aid flows or remittances of salaries earned outside a country (Dorman & Regan 2016:19).

READING BOX 1.1

USING THE GDP AND THE GNP AS INDICATORS OF DEVELOPMENT

GDP is defined as the total monetary value of all goods and services produced by a nation during a year (excluding any income from foreign investments).

GNP is defined as the total value of goods and services which become available during a period of time (usually a year) for consumption or saving by citizens or enterprises of a country, plus income from foreign investments.

STRENGHTS:

- It is easily calculated (compared to social indicators).
- GNP takes into account any income generated abroad by industry (based in the home country) and therefore it is usually seen as a more accurate measure of economic development than GDP.
- These indicators highlight rising wealth within a country.

WEAKNESSES:

- GDP/GNP (as well as National Income) figures can be very misleading. For example, is does not give any indication of the distribution. Furthermore, it tells us nothing about the quality of life experienced by the majority of the population.
- As mentioned above, rising levels of GDP or GNP indicate increasing levels of wealth within a country, however, that does not necessarily result in improved social conditions, including education and healthcare.
- Output and income from unreported cash transactions and from illegal activities. Example being, cash-in-hand work, such as baby sitting, helping a friend out with trade-related jobs or, on the illegal side, drug sales and counterfeit goods.
- What is actually produced in the less developed countries (LDC) does not always have a monetary value (informal economy). Example: subsistence farming still constitutes a significant proportion of the productive activities in LDC countries.
- It reflects gender bias. Unpaid domestic work of many women, for example, is not counted.

Source: https://danielwinsburysociology.wordpress.com/2014/01/06/strengths-and-weaknesses-of-measuring-development-gdp-gnp/comment-page-1/

The death rate of children younger than five years, also known as the "Under-five Mortality Rate" (U5MR), is based on death and birth data. It indicates the probability of a new born dying before its 5th birthday. One of the major limitations of the U5MR, as a development indicator, is a lack of reliable and accurate death and birth data required to calculate it, especially in less developed countries. The rate is expressed as deaths per thousand live births. To give you an idea, the U5MR for poor countries was about 99 deaths per thousand births for 2010-2015, compared to 7 deaths per thousand births for richer nations in the same period (United Nations 2013). Sub-Saharan Africa still had the highest U5MR rate in 2015. The Sustainable Development Goals (SDGs), which replaced the Millennium Development Goals (MDGs), set a global target for the U5MR at 25 or fewer deaths per thousand live births by 2030.

A high U5MR is usually linked to factors such as:

- poor access to safe water and sanitation
- undernutrition

- poverty
- lack of available, accessible and quality of primary health care services
- poor educational attainment of parents (especially of mothers).

For these reasons, the U5MR is a sensitive indicator of a country's health and nutritional status, primary health care services and social and educational progress. In addition, it is possible to disaggregate (break down statistically) the U5MR for different subgroups, for example, by gender, race, ethnicity or region to see which subsections are in the greatest need of assistance to improve the survival potential of children.

In an attempt to move away from economic criteria as the main basis for classification, the United Nations Development Programme (UNDP) in 1990 compiled a sophisticated classification system called the Human Development Index (HDI). Watch the HDI animated video by going to https://www.youtube.com/watch?v=4KIoYPyCJMo

In Reading Box 1.2 below, we quote a lengthy section from an article by Horner (1994), in which he takes a closer look at what the HDI is all about. Read through Horner's article and then answer the following question: Why is it important to view human development as meaning much more in a broader light than simply a lack of money?

READING BOX 1.2

THE HUMAN DEVELOPMENT INDEX

It was in recognition of the limitations of GDP as an indicator of development and of the fact that a "person's access to income … is not the sum total of human endeavour", that the UN Development Programme (UNDP) decided to devise a more sophisticated approach. The result was the so-called "Human Development Index" (HDI).

The HDI, as its name clearly suggests, is not concerned solely with "poverty" or "wealth", but with the broader concept of "human development". As such, it introduces two new elements – longevity and knowledge – while retaining adjusted GDP per capita statistics as the basic "standard of living" indicator.

It could be argued that the statistical result achieved gives a better overall picture of who the poorer states are, since longevity is, crudely speaking, a reflection of available health care, while knowledge equates with educational opportunity (and is one of the key factors enabling people or societies to escape from poverty). However, it is worth noting that such an approach produces a very different "league table" of poor and rich countries. The absence of an automatic link between income and human development is specifically acknowledged by the UNDP, with countries such as Sri Lanka and China revealing a much higher level of human development than their income might suggest, while the reverse is the case for states such as Gabon and the United Arab Emirates.

In the context of defining "poverty", the choice between restricting oneself to data about income, and taking a broader approach such as that used in HDI, depends ultimately on whether we view poverty in narrow, "material", terms or in wider, "quality of life", terms.

Whichever approach we choose to take, the best result is bound to be only an approximation. It seems that the perfect solution is only available in the perfect world, in which case there would presumably be no need to talk about poverty in the first place! However, in the short time that it has existed, the HDI has become the yardstick for many development experts in their efforts to focus on areas of greatest need (Horner 1994:49).

Values are assigned to each of three indicators, namely, economic indicators, health indicators and educational indicators. Initially, these indicators were the GDP per capita, life expectancy at birth and the average years of schooling. The HDI has undergone a few modifications over the years, most notably in 2010, when the following was added in the calculation of the HDI:

- the years of expected schooling for a child as based on current school enrolment trends
- the GNI per capita
- the HDI was adjusted to reveal inequalities, gender-specific inequalities and multidimensional poverty (Dorman & Regan 2016:19)

The UNDP (2016:3) explains that the HDI

> integrates three basic dimensions of human development. Life expectancy at birth reflects the ability to lead a long and healthy life. Mean years of schooling

and expected years of schooling reflect the ability to acquire knowledge. And gross national income per capita reflects the ability to achieve a decent standard of living. To measure human development more comprehensively, the Human Development Report also presents four other composite indices. The Inequality-adjusted HDI discounts the HDI according to the extent of inequality. The Gender Development Index compares female and male HDI values. The Gender Inequality Index highlights women's empowerment. And the Multidimensional Poverty Index measures non-income dimensions of poverty.

The HDI follows a somewhat complex mathematical calculation to produce a figure between 0 and 1, calculated to three decimal places. The nearer a country is to the upper figure, the higher its assumed level of human development. The UNDP produces a report that summarises development indicators, such as the HDI, in so-called Human Development Reports (HDR) – the latest of which is entitled: "Human Development for Everyone" (UNDP 2016). In the first HDR, published in 1997, the authors acknowledged that it was not their intention to include many different measures of development in order to render a comprehensive account. Instead, their attempts were restricted by the lack of complete, accurate, comparable (between different countries) and updated information.

Activity 1.2

Review the section on statistical indicators for development above. Answer the following questions:

1. What are the disadvantages of using the GDP or GNP as indicators of development?
2. Development can be measured according to the mortality rate of children under the age of 5 years. What are the advantages and disadvantages of using this as an indicator of development?
3. Explain what the Human Development Index (HDI) measures. Here, also watch the video available at https://www.youtube.com/watch?v=4KIoYPyCJMo to assist you in understanding this better.
4. You have just studied different development indicators. In your opinion, which one is best at explaining the level of development within a country? Give reasons for your answer.

1.5 CLASSIFYING COUNTRIES

When we discuss poverty and development, we need some terms that we can use for groups of countries that share many common characteristics. We have already mentioned that people use terms such as "developing", "poor" and the "South" to refer to countries that share some common characteristics. But, most of the terms that we use force us to classify countries as being either one thing or another. Countries are either rich or poor; they are either developed or developing; they are in either the North or the South. The result of these classifications is that we think about countries in terms of opposites: a rich country is the opposite of the poor one. When we think of countries in terms of opposites, we are more likely to stereotype countries that belong to the opposing groups. There is, however, one set of terms that allows for at least three classes of country: First World, Second World and Third World.

Let us begin by examining the meaning of the most popular of the terms: the Third World.

A group of independent journalists in Latin America annually publish a Third World Guide, which reflects, as they put it, "A view from the South" (Instituto del Tercer Mundo 1992:27).

Read through their explanation of the origins and meaning of the term "Third World", which we quote in Reading Box 1.3.

READING BOX 1.3

CLASSIFICATION OF COUNTRIES

The term "Third World" was first used by the French demographer, Alfred Sauvy, in 1952, and was immediately popularised in journalistic and diplomatic media. In the sense in which Sauvy used it, it was an allusion to the "tiers état" (third estate) of French society before the revolution of 1789.

This inferior tiers état was made up of the people deprived of privileges – as opposed to the clergy and nobility – and included a wide range of social categories: merchants, civil servants, artisans, peasants and salaried workers. Politically segregated at that time, they intended to overcome their exclusion. Thus, the original sense – which remains valid – refers to all those countries which, although differing greatly from one another, share the common fate of oppression.

However, as the meetings of TW [Third World] countries took place – Bandung in 1955, Belgrade in 1961, and Geneva (Group of 77) in 1964 – the international media, under heavy "Cold War" influence, viewed the attitude of Asian, African and Latin American leaders as a "third stance", in opposition to a clear-cut world split into two political, economic and military blocs: the socialist bloc, headed by the Soviet Union, and the bloc of industrial capitalist countries, headed by the United States.

"First World" and "Second World" are meaningless terms in the post-Cold-War-era, since the rivality [sic?] they refer to, does not exist any longer. However, the concept of the Third World refers to the everyday reality of two-thirds of humanity.

The disparities are such that, in more than one sense, it is logical to talk of separate "worlds". But, we all live on the same planet and the present environmental crisis, with phenomena like global warming or depletion of genetic resources, affects us all, rich and poor (Instituto del Tercer Mundo 1992:29).

What are some of the main issues raised in Reading Box 1.3? If you read the third and fourth paragraphs again, you will see that these authors believe that the "Third World" was initially a political or ideological term. The Asian, African and Latin American countries took up a "third stance", or a third position, in international politics, because they were starting to gain independence from their colonial rulers. They, therefore, wanted to find their own place in the world system, where they would belong neither to the First (capitalist) nor to the Second (socialist) World. The three conferences, referred to in the box, were also known as non-aligned conferences and it was at these conferences that the Non-Aligned Movement (NAM) was formed.

These non-aligned or Third World countries shared a number of common characteristics; they had been colonised and had, as a result, been deprived of privileges and oppressed for long periods. They also shared strong anticolonial feelings. As recently as the early 1990s, we could still use First World, Second World and Third World as a reasonably accurate way of referring to the world's three major political groupings, because there was a clearly identifiable capitalist and industrial West; a socialist Eastern bloc, consisting of the Soviet Union and its satellite states, and a third, loose, grouping of states, known as the Third World, that belonged to neither of these two groups. But what happens now that the socialist model of Eastern Europe seems to have failed and we can no longer clearly identify a Second World or a First World? Is the term "Third World" still valid?

If we regard the term simply as a political indicator and as a way of comparing the Third World with other political groupings, then we would argue that it is not a valid term any longer. Toye (1993:8-9), writing about the collapse of the central planning and authoritarian governments of Eastern Europe and the former Soviet Union, had the following to say about the term "Third World":

> An obvious implication of the disappearance, once and for all, of authoritarian central planning as a historically **viable** system of political economy is that a "Third World" must cease to exist. If the Second World of state socialism has indeed vanished into an historical **limbo**, what meaning or purpose can now be attributed to a Third World, defined in contrast to it? None, certainly, if the Third World had been nothing more than the creation of the Cold War politics, the group of neutrals **who wished a plague on the house** of both capitalism and socialism. But … the Third World concept was always more complex than that. The political cement, which held the Third World together, was never merely a passive **antipath**y to the two competing Cold War ideologies. It was the collective experience of colonisation and reasonable fear of neo-colonialism.

It is clear from what Toye (1993) says that he still regards the term "Third World" as valid. Like the writers of the passage quoted in Box 1.3, Toye (1993) believes that Third World countries formed a group, not just because they did not belong to the capitalist First World or the socialist Second World, but because of their history and their attitude towards colonialism. This argument is also raised in a book edited by Allen and Thomas (1992) for students at the British Open University. These authors quote a definition of Third World by an Egyptian economist, Abdalla (cited in Allen & Thomas 1992:5–6), who argued that the Third World consists of

> All those nations which, during the process of formation of the existing world order, did not become rich and industrialised … A historical perspective is essential to understand what is the Third World, because by definition it is the periphery of the system produced by the expansion of world capital.

In the light of this definition, Allen and Thomas (1992:6) point out that the term, "Third World", is still valid:

> This definition combines recognition of these human issues of poverty with an emphasis on common historical explanations. It relates the Third World to the formation of the international capitalist system (a process that occurred over several centuries of European capitalist domination of the world …) rather than

to the polarised post-war world political order of the "Cold War". Thus, it is as valid as ever with the end of that Cold War.

The above quotation clearly indicates that the term "Third World" is still a valid one and that we may use it to group together a large set of countries that have some common features.

1.6 "NORTH" AND "SOUTH" AS CLASSIFICATIONS

An alternative that has recently been widely accepted is the use of the terms "North" and "South". When we use these terms, we reduce the idea of three worlds to two worlds. The terms "North" and "South" group the capitalist countries of the West and the Eastern bloc countries in one category, with the Third World mainly grouped together as the "South", in the second category.

A closer examination of the different countries of the world shows clearly that there are differences between the industrialised North and the non- or semi-industrialised South. But, we need to keep in mind that this North-South contrast is very general and imprecise. Australia is geographically in the South; but, as an industrialised country, it has the characteristics of the North. Portugal and Rumania are in the North, but are poorer than several countries of the South. So, if we generalise and talk about the North and South, we will still have to qualify our statements by talking about "most of the countries of the South" and "most of the countries of the North".

From what we have said above, there seem to be problems with all the terms we have discussed so far. If you still feel slightly dissatisfied about using the term "Third World" or if you are unhappy with the impreciseness of "North" and "South", what about the words "developed" and "developing"? Is it better to talk about "developing" countries? What about the term "less developed countries"? There are probably as many people who support these terms as there are those who reject them.

Those in favour of using these terms argue that the word "developing" is neutral and puts most countries of the world in the same boat. Those against using these terms argue that they are by no means neutral. They believe that "developing" implies that there is an ideal state or condition of "being developed" and that all countries of the world are busy making their way towards this condition – some faster than others.

The problem with concepts such as "developing", "underdeveloped" and "less developed" is, therefore, that they seem to refer to a state of being "developed", and to a movement away from being "backward". So, when we use one of these concepts, we first have to decide how developed a country or a community is in relation to the state of being developed. But, these culturally and subjectively determined concepts reflect a particular view of the world and an expectation that there is a state of being or condition that is:

- desirable
- worth striving for
- uniform (or unvarying) and that it is inevitable that all countries will eventually reach that condition or state of being

Some writers do not use any of these terms and distinguish, instead, between poor and rich countries.

The World Bank is one international organisation that focuses primarily on economic features in its analysis of countries. It therefore uses economic indicators as indicators of development, particularly the GNP per capita.

The World Bank distinguishes between:

- low-income
- middle-income (divided into lower-middle and upper-middle)
- high-income countries

There are many problems with a straightforward classification between poor and rich countries:

- Firstly, it generalises about conditions within these countries and does not allow for division within the countries.
- Secondly, and more seriously, it implies that you have to use a classification system based almost exclusively on economic criteria and indicators such as GNP and per capita income.

The World Bank's classification system is an elaborate one and much more complex than a simple contrast between rich and poor, but it nevertheless focuses on only one element of a society – the economy. One of the most serious problems of using GNP per capita as an indicator of development is that it gives us no indication of how the GNP (which is the total economic output) is spread throughout the country. This means that we have no idea whether the distribution of goods and services within a country is equitable or fair and reasonable for all people.

Toye (1993) argues that we cannot generalise about countries simply on the basis of economic criteria because, over the past two decades, there have been marked changes in the economic status of "developing" countries. As Toye (1993:35) puts it: "As a result, the Third World in the past twenty years has increasingly departed from economic homogeneity."

1.7 DEFINING DEVELOPMENT

The idea of "development" in Development Studies is one of those concepts that are heavily influenced by those complexities such as subjectivity, dominance, negotiations and contestations, among others, that we briefly discussed in the introduction to this unit. This means that a comprehensive definition of "development", as per our brief discussion in the introduction of some of the strategies of defining such complex terms, would ideally require us to develop a historical understanding of the concept's origin and the manner in which it has changed shape and meaning across time and space. In Reading Box 1.4 below, we quote Chambers (2004:1-2) in his attempt at defining development.

1.7.1 Development as economic growth

In Reading Box 1.4 (below), you will see that the earliest conceptualisations of development had an economic bias. It was also linked to international relations,

especially in the wake of the Second World War, when international development was emphasised in the so-called "age of development planning and foreign aid".

READING BOX 1.4

THE CHANGING MEANING OF DEVELOPMENT

The eternal challenge of development is to do better. Usually this is tackled by identifying policies, programmes and projects. Both the *Human Development Report* 1997 (…) and the *World Development Report* 1997 (…) follow in a long tradition by listing policies and actions to make the world a better place, especially for the poor. The argument of this editorial is that this does not go far enough. There is a crucial missing link. We need to add the personal dimension. This implies stepping back and engaging in critical self-examination. To do better, we have to examine not just the normally defined agenda of development "out there"; but ourselves, how our ideas are formed, how we think, how we change and what we do and not do.

For professionals committed to development, the world we wish to bring forth is linked to what we mean by development.

On the cover of *The Development Dictionary*, a sentence by Wolfgang Sachs proclaims, "The idea of development stands today like a ruin in the intellectual landscape. Its shadow obscures our vision." In contrast, Daphne Thuvesson has written, "As the existing system crumbles around us, new and exciting alternatives are sprouting up in the rubble."

Sachs' pessimism and Thuvesson's optimism are both needed.

The record of "development" is mixed. Those who damn the errors, failures and deficits tend to ignore the counterfactual, how much worse things could have been if nothing had been done. Those who laud achievements and successes tend to overlook how much better things might have been even than they were. A balanced view has to recognise renewals and continuities in the landscape as well as ruins and rubble, and older trees as well as new sprouts.

To explore the terrain, let us start, as *The Development Dictionary* does, by examining words and concepts that are common currency in contemporary development discourse and with which we seek to "bring forth our world".

Development has been taken to mean different things at different times, in different places and by different people in different professions and organisations. The dominant meanings have been those attributed by economists and used in economics.

Development has thus often been equated with economic development and economic development, in turn, with economic growth – often abbreviated simply to growth. But, the meanings given to development have also evolved, not least through the concept of human development in the *Human Development Reports* of UNDP. In all cases, though, however clinical the analysis or disparate the definitions, the word seems to have had two aspects: it has been normative and it has involved change. So the underlying meaning of development has been good change. That is the sense in which it is used here.

Views have differed and perhaps always should and will differ, about what is good and what sorts of change are significant.

Source: Chambers (2004:1-2)

It is important to note that the forces that gave rise to the Second World War led, inter alia, to a divide between communism and liberal capitalism as two major ideological camps. The main powers of each bloc used development assistance to prescribe best models for development in the poorer countries. Remenyi (2004:24) explains:

> Armed with the tools of Keynesian demand management economics, the political and economic thinkers and leaders of the Western alliance welded the interests of donor economies to those of aid recipients. Among the Eastern-bloc economies, led by the example of the early successes of Soviet economic progress, similar processes were evident, though the driving force was political and ideological rather than economic.
>
> Whether assisted by donors from one side of the Cold War or the other, the development outcomes sought were documented in grandiose five-year national development plans. For much of the last 50 years, no self-respecting developing country could be without a five-year plan. Yet, the history of modern development has shown that, all too often, these plans were built on false assumptions and poor quality data.

State- and industry-driven capitalism saw countries such as the United States (US) undergoing rapid economic growth. In 1944, a conference at Bretton Woods led to the establishment of the International Monetary Fund (IMF) and the International Bank for Reconstruction and Development (better known nowadays as the World Bank). These two powerful institutions together with the World Trade Organisation (WTO), referred to in literature as the Bretton Woods institutions, had to assist in post-war reconstruction by providing loans, credit, assistance and investment for countries to achieve the kind of economic success enjoyed by the US and many Western capitalist countries.

In addition, from 1944 onwards, the United Nations and its different specialised agencies (such as the World Health Organization, the International Labour Organisation, UNICEF and UNDP) were supposed to ring in an era of global human security after the devastation of the Second World War. Supporting development was regarded as a way to maintain peace and security.

These powerful institutions dominated global thinking about development, with the IMF and World Bank focusing on market-led economic growth and the UN on human and social development.

1.7.2 Development as modernisation

The liberal capitalist model was regarded as one that followed a single, linear path with success measured as larger national economies and industrial transformation. This was seen as a recipe to be emulated in order to "modernise".

As erstwhile colonies gained independence, this model or recipe was believed to result in growth and modernisation in the newly independent states. The idea was that progress would replace traditional values and institutions. Modernisation was thus equated to "the process of change towards those types of social, economic, and political systems that have developed in Western Europe and North America"

(Eisenstadt 1966:1). This model of development was held to imply economic "catch-up" for poorer countries, with the benefits of such growth "trickling down" to all people inside such countries.

Nations that did not side with either communism or liberal capitalism were referred to as the non-aligned nations. Can you see that in the era of the Cold War and post-colonisation, it served the interest of some Western states and the US to extend control over non-aligned states via foreign aid and development assistance? This acted in securing access to the resources in these states. By providing technical and financial aid to the so-called "backward" societies, Western notions of modernisation became hegemonic. Can you see that this makes development a means as opposed to an end? Unger (2010:9) says of the link between the concepts development and modernisation:

> Both concepts were about economic growth, and both contained a distinct notion of linear 'progress' as measured in terms of the industrialized nations' standards. From a historical perspective, however, certain differences do come to light. Modernization contained a much stronger claim to remake both entire social orders and individual lives. Whereas development aimed at infrastructure, modernization was about social organization and was thus more heavily interventionist and reliant on social engineering and planning.

From this conceptualisation of development, other, more people-centred understandings developed. One of the major theoretical ideas that challenged the Western modernisation model was the idea of underdevelopment or dependency.

1.7.3 Development and dependency

Modernisation theory and its models for development came under attack during the 1950s, when it became clear that the assumed alleviation of poverty and elimination of inequality did not occur in the so-called "underdeveloped" world. Instead, the world was polarised into rich and powerful core regions and impoverished and dependent peripheral regions. Especially Latin American and Marxist theorists developed the ideas for the dependency school of development. One influential dependency scholar was Andre Gunder Frank, who argued that underdevelopment was not an original condition in poorer nations, but actually the result of the development patch undertaken by rich nations. It was because rich nations exploited colonies that they were able to develop quickly and to the expense of the so-called underdeveloped regions (McKay 2004:53-55).

Watch the short video at https://www.youtube.com/watch?v=JN6LlMY2ApQ for a brief explanation of dependency theory.

1.7.4 Development as human well-being

The move towards people-centred, participatory ideas of development to oppose the economic-centred notions, includes the ideas of Amartya Sen. Sen (1999) introduced the idea of development as freedom and development as based on human capabilities. Both ideas are based on an understanding that human well-being is a complex, multi-dimensional concept, based on much more than a person's income. This means that development should be about expanding people's freedom to develop their

own capabilities. Such an expansion further implies that all impediments to human well-being should be addressed, such as poverty, poor health, educational and social services, lack of political freedom to participate in development and decision-making or in community life, and so on. These freedoms and expansion of capabilities then become both the means and the ends of development.

Naz (2016:2) says that:

> Sen contributed to shifting the focus in the field of economics and development studies from an exaggerated emphasis on growth toward issues of personal well-being, agency, and freedom. Sen acknowledged the importance of growth and material prosperity for human development. However, Sen advanced much compelling arguments for going beyond the notion of utility and welfare when it comes to judging personal well-being or human development … Although traditional development economics has shifted its focus from growth to income distribution, income alone is not an adequate basis for analyzing a person's entitlements, i.e. a rise in income does not automatically or necessarily translate into an entitlement to education or health services, social equality, self-respect, or freedom from social harassment.

The idea of development as freedom directly influenced the HDI. For example, the 2016 HDR (UNDP 2016: iii) commences with the statement that "[h]uman development is all about human freedoms: freedom to realize the full potential of every human life, not just of a few, nor of most, but of all lives in every corner of the world—now and in the future".

1.7.5 Setting international development goals: the Millennium Development Goals (MDGs) and the Sustainable Development Goals (SDGS)

The MDGs were undersigned by 189 leaders of nations in 2000 at a gathering of the UN. This was an attempt to set targets for global human-centred development to be achieved by 2015. The MDGs were:

Goal 1: Eradicate extreme poverty and hunger
Goal 2: Achieve universal primary education
Goal 3: Promote gender equality and empower women
Goal 4: Reduce child mortality
Goal 5: Improve maternal health
Goal 6: Combat HIV/AIDs, malaria, and other diseases
Goal 7: Ensure environmental sustainability
Goal 8: Develop a global partnership for development

The MDGs were an attempt at setting international, time-bound targets for development and it has achieved some success since 2000. The MDG framework enabled aid donors, international agencies and country decision-makers to focus on specific areas that need attention and to look at the results achieved. Many countries improved their data collection systems in an attempt to demonstrate MDG achievements.

The MDGs have also been met with criticism. Firstly, its apparent pro-poor focus was undermined by the fact that the data on goal achievements tended to mask

inequalities inside countries. Secondly, it prioritised some goals over others, thereby neglecting to fully address cross-cutting structural reasons for inequality or poor health outcomes. Thus, although some health-related targets were met, major problems in national health care systems were not addressed. This meant that sudden outbreaks of infectious diseases, such as the Ebola outbreak in West Africa, could not be dealt with efficiently. Thirdly, the MDGs tended to again follow a blueprint, "one-size-fits-all" approach to development. Countries which had poor development indicators to start off with, or that were plagued by severe conflicts, had weaker abilities to achieve the MDGs than others. Fourthly, the achievements of most MDGs relied heavily on financing of enabling programmes. Fifthly, it relied heavily on data collection and analysis for the purposes of monitoring and evaluation to such an extent that this in many cases dominated instead of the achievement of actual development goals (WHO 2015:1-12; Daly, Kumar & Regan 2016:43-45).

Although many countries made significant progress in achieving these goals, they were not completely met. As these goals came to the end in 2015, the post-2015 development agenda conceived the SDGs to replace them. They are:

1. End poverty in all its forms everywhere
2. End hunger, achieve food security and improved nutrition and promote sustainable agriculture
3. Ensure healthy lives and promote well-being for all at all ages
4. Ensure inclusive and equitable quality education and promote lifelong learning opportunities for all
5. Achieve gender equality and empower all women and girls
6. Ensure availability and sustainable management of water and sanitation for all
7. Ensure access to affordable, reliable, sustainable and modern energy for all
8. Promote sustained, inclusive and sustainable economic growth, full and productive employment and decent work for all
9. Build resilient infrastructure, promote inclusive and sustainable industrialization and foster innovation
10. Reduce inequality within and among countries
11. Make cities and human settlements inclusive, safe, resilient and sustainable
12. Ensure sustainable consumption and production patterns
13. Take urgent action to combat climate change and its impacts
14. Conserve and sustainably use the oceans, seas and marine resources for sustainable development
15. Protect, restore and promote sustainable use of terrestrial ecosystems, sustainably manage forests, combat desertification, and halt and reverse land degradation and halt biodiversity loss
16. Promote peaceful and inclusive societies for sustainable development, provide access to justice for all and build effective, accountable and inclusive institutions at all levels
17. Strengthen the means of implementation and revitalize the global partnership for sustainable development

Source: WHO (2015:7)

1.7.6 The difficulty of "definitions" of development

What you need to bear in mind is that theoreticians and practitioners in the field of development all agree that there is no agreement about the meaning of development. Toye (1993:31) explains why this is so:

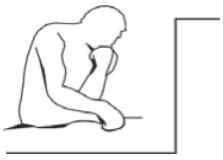
> It is important to realise that an apparently neutral and scientific word like 'development' is no such thing. Definitions of the goals of development and of the process whereby these goals should be striven for unavoidably depend on the values of the person doing the defining, as well as on facts that are in principle falsifiable.

But to say that development is a value-laden concept and to point out that all developing contexts are unique and that there are no quick recipes for development, is extremely unhelpful. As a student of development, you would be stuck if you did not allow yourself to look for similarities and for solutions to the problems of poverty and development. Thus, when we speak of development, we are concerned with the most urgent needs and the greatest imbalances in human societies today. We are particularly concerned to fight against and, if possible, overcome the evils of mass poverty, which is found largely in the developing world.

In terms of world politics, the countries of the global South are all relatively powerless compared with the countries of the global North. They are also in a process of stressful and often chaotic social change. Development efforts, therefore, should aim at addressing the present needs of the poorest sectors of the society. However, the plans for these development efforts are made in places where there are already struggles over these needs. This is because attempts at self-advancement are made in national and international social, economic and political spheres.

Therefore, the attempts of developers to bring about change in these complex, crisis-ridden communities and countries, often overlap with the efforts of such countries to advance their interests and strengthen themselves.

Can we then argue that "development" is the same as "self-advancement"? No. If you think about this, it should be clear to you that the self-interest of various groups within the Third World may contradict and block the interests of other groups. This also implies that the advancement of certain countries may take place at the expense of neighbouring states.



Activity 1.3

Write an essay of two pages about the changing meaning of development. Use the following sub-headings:

1. The meaning of development after the Second World War
2. Development as modernisation
3. Development and dependency
4. Development as human well-being
5. The era of development goals – the MDGs and the SDGs
6. The difficulty of "definitions" of development

1.8 DEVELOPMENT AS POSITIVE CHANGE AND DEMOCRACY AS AN INGREDIENT

If we claim that development is positive change in countries and communities, how then do we define "positive"? How do we determine or decide when a change is positive rather than negative, constructive rather than destructive? It is difficult to determine exactly what positive change is. In our subject, the idea of development is inevitably connected with social, economic and political improvement or advancement. Yet, since people in any country disagree greatly about what change is good and what change is bad, how can people who are concerned with development decide what is "really" positive social, economic and political change?

The truth is that there is no absolute, accurate meaning of the term "development" in Development Studies. But this does not imply that development can mean anything you want it to mean, or that any change is positive change. So how do we determine what will be positive change within a particular situation?

Part of the answer to this question is that in order to determine what development means in a given situation, you need to know what the people in that situation believe they need. Therefore, there must be consultation, discussion and debate among and with the people who are affected by any development initiative.

Democracy is the process we use to integrate diverse social needs and wants so that they can be seen as a whole, and to prioritise these needs so that we can decide which ones have to be attended to first. If we approach development as "positive change" in this way, we are defining it as the freely-chosen project or strategy of the majority of a group of people or a nation. Here everyone takes responsibility for making the change or development effort successful. The form of democracy will vary according to differences in tradition, the strength of state structures (such as parliament, the courts, the bureaucracy) and how easy it is for the people concerned to communicate with one another. However, development must always relate closely to popular hopes and aspirations.

Development, in the sense of positive change, is thus a process. It must ideally occur though democratic and consultative practice, through identifying as accurately as possible what is good for people in a particular context, and then acting on this, and through the realistic identification of constraints and opportunities. We can assume that, in general, the development process will lead to greater material and spiritual welfare of the society concerned and for individual people living in that society, and to the eradication of poverty.

We can also assume that development efforts will lead to a better-organised national economy and government. Eventually, development efforts must change the inequalities of the world order. But, development efforts happen in particular contexts, which interact with one another and their results cannot be determined in advance.

We therefore need to view each development process as part of the contexts within which it occurs. This means that we need to deal with each development problem in a way that acknowledges its uniqueness. We constantly need to keep in mind the words of Toye (1993:39) when we try to come up with solutions to a developmental problem:

There is no simple or special way to analyse the realities of the Third World and therefore there is no simple or special set of instructions that can be given to change those realities successfully.

1.9 OUTCOMES CHECKLIST

Question		Can do	Cannot do
(1)	List six (or more) characteristics that developing countries have in common.		
(2)	Write a paragraph of no more than 150 words on the dangers of stereotyping. Now look at your answer to question 1 and decide whether you were guilty of stereotyping when answering it.		
(3)	Do you think it is still valid to use the term "Third World"? Give reasons for your answer.		
(4)	Write a paragraph of no more than 200 words in which you explain the meaning of the terms "North" and "South".		
(5)	Which of the following terms would you use when referring to the weak and poor states of the world: developing states, the Third World, the South, low-income countries? Give reasons for your answer.		
(6)	Write a two-page essay in which you describe the issues you would consider when defining the term "development". Give reasons for your choice of issues.		

Study Unit 2

SUSTAINABLE DEVELOPMENT

"The environment does not exist as a sphere separate from human actions, ambitions, and needs and attempts to defend it in isolation from human concerns have given the very word "environment" a connotation of naivety in some political circles." – (WCED 1987)

OUTCOMES

After studying this unit, you should be able to:

- define the concept of sustainable development and identify key issues relating to sustainable development in the world
- describe the relationship between development and the environment
- describe the relationship between poverty and environmental degradation
- describe climate change and other challenges affecting sustainable development

2.1 INTRODUCTION

Development Studies, as a field of study, is confronted by a number of dilemmas which include poverty, demography, underdevelopment and other social issues. In addition to these issues, the concept of conserving the ecosystem and distributing the available natural resources for livelihoods purposes is receiving increasing attention in Development Studies and other related fields. This can be attributed to the significance of creating a balance between satisfying human needs and protecting the environment.

To achieve well-being, people need adequate and secure livelihoods. Since the majority of the people in the Third World live in rural areas, land and nature play a vital role in making a secure livelihood possible. Narayan, Chambers, Shah and Petch (2000:45) argue that in rural areas much hardship is linked to reduced access to land, bad soils, adverse weather, lack of fertilisers and other inputs, deficiencies of transport and marketing, and overexploitation of common resources such as fish, pastureland and forests.

This argument gives a clear indication of why exploitation occurs, which, in turn, results in difficulties achieving sustainable development.

The discourse/concept of sustainable development has gained momentum in the decades since the Stockholm United Nations Conference in 1972, followed by significant events such as the popularised occasion, "*Our Common Future*", a report published by the WECD in 1987, the Rio de Janeiro United Nations Conference on Environment and Development (UNCD) in 1992 (Agenda 21) (Barter & Russell 2012) and the Johannesburg Summit in 2002. All of these represent a vital genealogy of the discourse/concept of sustainable development, as politicised by different actors rooted in the social science tradition and democratic traditions of interventionist global government. But, most importantly, this discourse/concept has been utilised in innumerable projects, programmes and initiatives.

2.2 SUSTAINABLE DEVELOPMENT: WHAT DOES IT MEAN?

For a better understanding of the concept of sustainable development, one must first understand the two main terms: sustainability and development. Sustainability is the process suggested to improve the quality of human life within the limitation of the global environment (Mensah & Castro 2004). This process involves solutions which can improve human welfare without resulting in environmental degradation. Development, on the other hand, entails a significant improvement in the well-being of the people. Table 2.1 gives a clear description of these two terms.

Table 2.1: Understanding sustainable development

WHAT IS TO BE SUSTAINED:	FOR HOW LONG	WHAT IS TO BE DEVELOPED:
	25 years	
	"Now and in the future"	
	Forever	
NATURE		PEOPLE
Earth		**Child survival**
Biodiversity		**Life expectancy**
Ecosystems		**Education**
		Equality
		Equal opportunity
LIFE SUPPORT	**LINKED BY**	ECONOMY
Ecosystem	only	**Wealth**
Services	mostly	**Productive sectors**
Resource	but	**Consumptions**
Environment	and	
	or	
COMMUNITY		SOCIETY
Cultures		**Institutions**
Groups		**Social capital**
Places		**States**
		Regions

Source: US National Research Council (1999)

According to the classical definition given by the United Nations WECD in 1987, development is sustainable if it "meets the needs of the present without compromising the ability of future generations to meet their own needs".

In technical terms, the concept implies a developmental path along which maximising human well-being for today's generation does not lead to declines in future well-being (OECD 2001). From the definition provided above, it becomes clear that sustainable development is not a "fixed state of harmony"; it is rather an ongoing process of evolution, whereby developmental actions do not reduce the ability of future generations to meet their own needs.

READING BOX 2.1

KEY CONCEPTS IN SUSTAINABLE DEVELOPMENT AND ENVIRONMENTALISM

The following is an abstract from http://www.sustainable-environment.org.uk/Earth/Ecocentrism_and_Technocentrism.php

Ecocentrism (meaning values centered on ecology) and technocentrism (meaning values centered on technology) are two opposing perspectives concerning attitudes towards human technology and its ability to affect, control and even protect the environment.

Ecocentrics, including "deep green" ecologists, see themselves as being subject to nature, rather than in control of it. They lack faith in modern technology and the bureaucracy attached to it. Ecocentrics will argue that the natural world should be respected for its processes and products, and that low impact technology and self-reliance is more desirable than technological control of nature.

Technocentrics, including imperialists, have absolute faith in technology and industry and firmly believe that humans have control over nature. Although technocentrics may accept that environmental problems do exist, they do not see them as problems to be solved by a reduction in industry. Rather, environmental problems are seen as problems to be solved using science.

Indeed, technocentrics see that the way forward for developed and developing countries and the solutions to our environmental problems today lie in scientific and technological advancement.

Today, most people still believe in the necessity of human progress. Conservationist principles and the ability of technology to protect nature, should ensure that today's standard of living is maintained in the future, but not at the expense of environmental degradation. Most people today are probably still "shallow" environmentalists. This position, however, is unacceptable to the more radical environmentalists or ecocentrics who share the views of the "deep green" ecologists. A shift towards a more nature-centered rather than human-centered society would ensure that unspoiled areas are preserved and degraded areas restored.

Can you see that an **ecocentric approach to sustainable development** is in favour of preserving the society-nature relationship, with environmental protection as emphasis? Ecocentrics favour a holistic view that sees ecosystems and social systems as parts of a whole and seeks to harmonise the relationship between them. This can be contrasted with the technocratic and anthropocentric approaches "in which human ingenuity and the spirit of competition dictate the terms of morality and conduct" (O'Riordan 1989:82).

As you would have seen in Reading Box 2,1, ecocentrism also extends to **deep ecology**. The concept of deep ecology was introduced by Arne Naess (2003) to urge people to ask deeper questions about the society-nature relationship. This has become a world view that stresses holistic thinking about development, science, spirituality, economics and ecology. Tulloch (2013:101) says that:

> As an environmentalism, 'deep ecology' seeks to motivate individuals through adherence to normative underpinnings that see all life on earth as interdependent and as having inherent value. In 1984, Arne Naess developed a set of philosophical premises underpinning deep green environmentalism as a platform from which to base policy development …. These include an ecocentric perspective, whereby human and non-human life are of equal value and have an inherent worth that is independent of the usefulness of the non-human world for human purposes.

Also situated in the ecocentric approach, is **the so-called Gaia hypothesis**. This hypothesis states that the earth (or Gaia) is self-regulating system (Lovelock 1987). Some of these ideas are further elaborated by the proponent of **communalism in ecology**, such as Murray Bookchin (1982). Central to Bookchin's ideas is that people are products of nature, who impact on nature not only through their attitudes towards the natural world, but also through the kind of society they have created by consciously intervening with nature (or the ecosphere) in their quest to develop. By doing so, industrialists, capitalists and lumber barons, for example, have distorted the society-nature relationship. In addition, Bookchin (1982) asserts that the domination of the ecosphere by people coincided with domination in social spheres of life – such as the patriarchal domination of women for example. Communalist ecologists thus stress a shared common humanity and seek a reconciliation with nature. They favour the use of renewable resources, self-reliant development and appropriate technologies.

The **accommodation approach** holds that people have the right to exploit resources, but need to do so in a sustainable, responsible and careful way. This position is held by the United Nations WECD.

The **interventionists**, in contrast, hold that the exploitation of resources will be balanced by the market forces of supply and demand. As finite natural resources become overexploited, the money generated by business and the market will fund research and innovation to overcome these problems. Typically, interventionists place greater stock in innovation than in the fear created by dire predictions of impending ecological disasters. Tulloch (2013:109) explains this as follows:

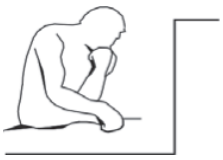
> Neoliberal policy can be found in what Irwin calls the 'market version' of sustainability, where threats to the ecological integrity of the planet are a matter to be addressed by 'innovation (new markets) and efficiency (reduced costs)'. The centrality of 'crisis' in sustainability discourse has performed an ideation function, motivating public support through fear.

In table 2.2, Gough, Scott and Stables (2000:43 & 45) summarise the central concerns of the various approaches.

Table 2.2 Approaches in environmentalism

Ecocentrism		Anthropocentrism	
• Postmodernist • Decentralist • Libertarian • Feminist • Cooperative • Participatory • Egalitarian • Holistic • Protective • Nurturing • Seeking stability • Environment is a social construct		• Modernist • Centralist • Authoritarian • Patriarchal • Competitive • Managerial • Hierarchical • Reductionist • Exploitative • Manipulative • Seeking progress • Environment is a given	
Gaianism	Accommodation	Communalism	Interventionism
Trust Gaia to be self-regulating	Value all life	Fairness is the key	Progress above all else

Source: Gough et al (2000:43 & 45)



Activity 2.1

Study table 2.1 and 2.2, as well as Reading Box 2.1, carefully, then answer the following questions:

1. What are the differences between ecocentric, anthropocentric and technocentric approaches to sustainable development?
2. What do Gaians believe in?
3. View the video at https://www.youtube.com/watch?v=CP2_4wrCmkA. How does a communalist like Murray Bookchin see environmental sustainability?
4. What is the difference between the accommodation or interventionist approaches to environmentalism?
5. What sort of an environmentalist are you? Give reasons for your answer.

Different factors cause environmental damage and ultimately make it difficult for sustainable development to occur in developing countries. These factors are: biodiversity depletion (habitat destruction, habitat degradation, extinction); food supply problems (overgrazing, farmland loss, soil erosion, wetlands, overfishing, coastal pollution, soil salinisation, water shortages, loss of biodiversity, groundwater depletion); air pollution (global climate change, stratospheric ozone depletion, urban air pollution, acid deposition, indoor pollutants, noise) and water pollution (oil spills, pesticides, toxic chemicals, sediments, nutrient overload).

Activity 2.2

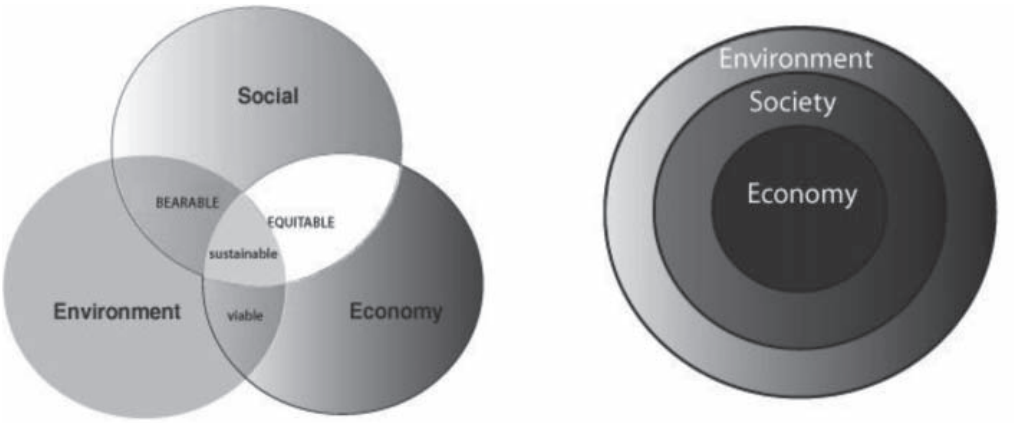
Answer the following questions:

1. Explain in your own words what sustainable development means.
2. What is the relationship between people and the environment?

3. Research the meaning of the following words. Then write one sentence linking each word to factors that cause environmental damage and ultimately make sustainable development difficult to achieve:

   a biodiversity depletion
   b ecological footprint
   c extinction
   d habitat degradation
   e habitat destruction

The main focus of sustainable development is to improve the quality of life for all without increasing the use of natural resources beyond the capacity of the environment to supply them indefinitely. "Sustainable" development could probably be otherwise called "equitable and balanced", meaning that, in order for development to continue indefinitely, it should balance the interests of different groups of people, within and across generations, and do so simultaneously in three major interrelated areas – economic, social and environmental – also known as the pillars of sustainable development (Soubbotina 2004:9).



Source: Ochola et al (2010)

Figure 2.1: Interdependent pillars of sustainable development

The three essential dimensions of sustainable development are:

- **Economic:** an economically sustainable system must be able to produce goods and services on a continuing basis, to maintain manageable levels of government and external debt and avoid extreme sectoral imbalances that damage agricultural and/or industrial production.
- **Environmental:** an environmentally sustainable system must maintain a stable resource base and avoid overexploitation of non-renewable resource systems, including maintenance of biodiversity, atmospheric stability and ecosystems services, which are not always looked upon as economic resources.
- **Social:** a socially sustainable system must achieve fairness in distribution and opportunity among all persons with adequate provision of such social services as health, education and gender equity. The social dimension focuses on reconciling the environment and development, and governance related to provision of social services.

Activity 2.3

Below are the three pillars of sustainable development with an example for each. Give other, more relevant, examples in the space provided.

Environmental objectives

- Rational use of renewable natural resources
- Conservation of non-renewable resources
- .....

Social objectives

- Education
- .....

Economic objectives

- Growth
- .....

2.3 PEOPLE AND THE ENVIRONMENT

2.3.1 The relationship between people and the environment

There is a strong relationship between the environment and the people; this relationship can be best understood through the concept of ecology. The study of the interaction between biotic (living) and abiotic (non-living) components of the environment is called "ecology".

The abiotic components include water, wind, atmosphere and so forth and that would be presenting an unrealistic and one-dimensional picture. Instead, we want to ensure that the picture is as complete as possible. For this reason, we will constantly refer to the anthropogenic (human) effect on the environment.

One way in which human beings impact on the ecology has to do with numbers: the more people there are in a given area, the greater their impact on the natural environment. This is one of the relationships we will explore here. But the number of people, or population size, is not the only factor that negatively affects the environment. Africa does not have a particularly high population density when compared to other developing regions. The social, economic and political relationships that determine people's access to resources such as land and potable (drinkable) water are just important.

The seriousness of Africa's environmental condition was summarised in a book written by Lloyd Timberlake, published in 1985. This publication, entitled "Africa in crisis: the causes, the cures of environmental bankruptcy", was extremely well received because it spelled out clearly the extent of the environmental crisis in Africa. In the same year as it was published, it was awarded the World Hunger Media Award. In this book, Timberlake (1985:9) argues that the African environment is bankrupt and spells out the implications of this as follows: "As the soil erodes so do Africa's living standards. Bankrupt environments lead to bankrupt nations and may ultimately lead to a bankrupt continent."

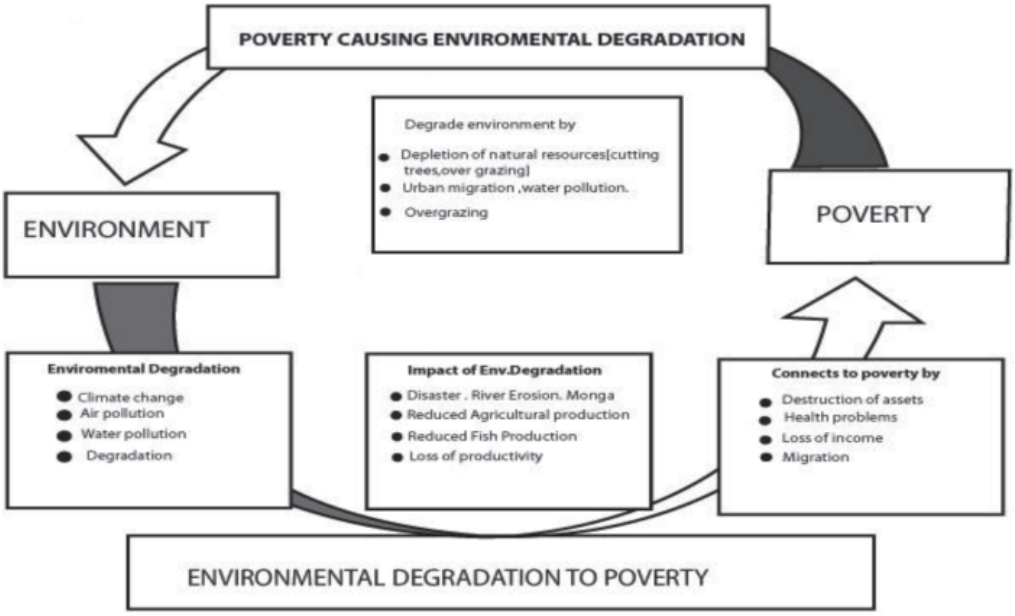
To help you to fully understand Timberlake's point, we now take a look at the carrying capacity of African countries and natural resources, with special reference to fuel and water. The impoverishment of African agricultural soil and deterioration of the environment are attributable mainly to deforestation, desertification and soil erosion.

We conclude this study unit by briefly examining the idea of sustainable development once again.

2.3.2 Poverty and the environment

The state of an environment is highly dependent on the socioeconomic well-being of the local population. According to the UNCD, poverty is a major cause and effect of global environmental problems. This view is known as the "orthodox view" or the "downward spiral" of natural resources management and poverty. This dominant view posits that there is a vicious downward spiral: poor people are forced to overuse environmental resources to survive from day to day, and the degradation of natural resources further impoverishes them, making their survival ever more difficult and uncertain (Washington et al 2010).

The impact of poverty on the environment can be best described as the overexploitation of natural resources as a means to escape poverty and to change the socioeconomic well-being of the rural poor. As a result of poor living conditions and isolation, as explained by Chambers' depravation trap, the local natural resources are the means of subsistence and production since it is readily available. In the absence of any other options, the poor are bound to exploit the natural resources for their livelihood needs. However, the rapid degradation of natural resources pushes the poor further down in the spiral, making them more vulnerable and keeping them in abject poverty. The relationship between poverty and the environment is illustrated in figure 2.2.



Source: Choudhury and Ahned (in Ochola et al 2010:22)

Figure 2.2: Relationship between poverty and the environment

2.3.3 Human activities and climate change

You have probably read or heard about global warming or the greenhouse effect. Problems such as these have created grave concern among people and governments throughout the world about threats to the environment which, like these, could affect all of us, in all countries. As a result, the protection of the environment has become a central issue in current development debates. Because of this international concern about the deterioration of the environment, particular attention has been given to human activities and the effects they have on the environment.

Climate change is a significant challenge. It is predicted to exacerbate the intensity and magnitude of extreme weather events like floods, cyclones, droughts, fluctuating weather extremes, heavy rains and strong winds. The effects associated with this climate change will be negative on the natural and social systems. Human livelihoods, especially those of nature-based economies, will be adversely affected and the changes in precipitation and temperature patterns and trends will affect the productivity of ecosystems and thus the availability and distribution of goods and services (Yanda et al 2010). In Africa, climate change will impact on the availability of water, agricultural yields, commodity prices, employment, food security and human welfare (Erasmus, Van Jaarsveld, Van Zyl & Vink 2000).

Mendelsohn (2008:16-17) reviews various studies about the effects of climate change on developing countries and concludes:

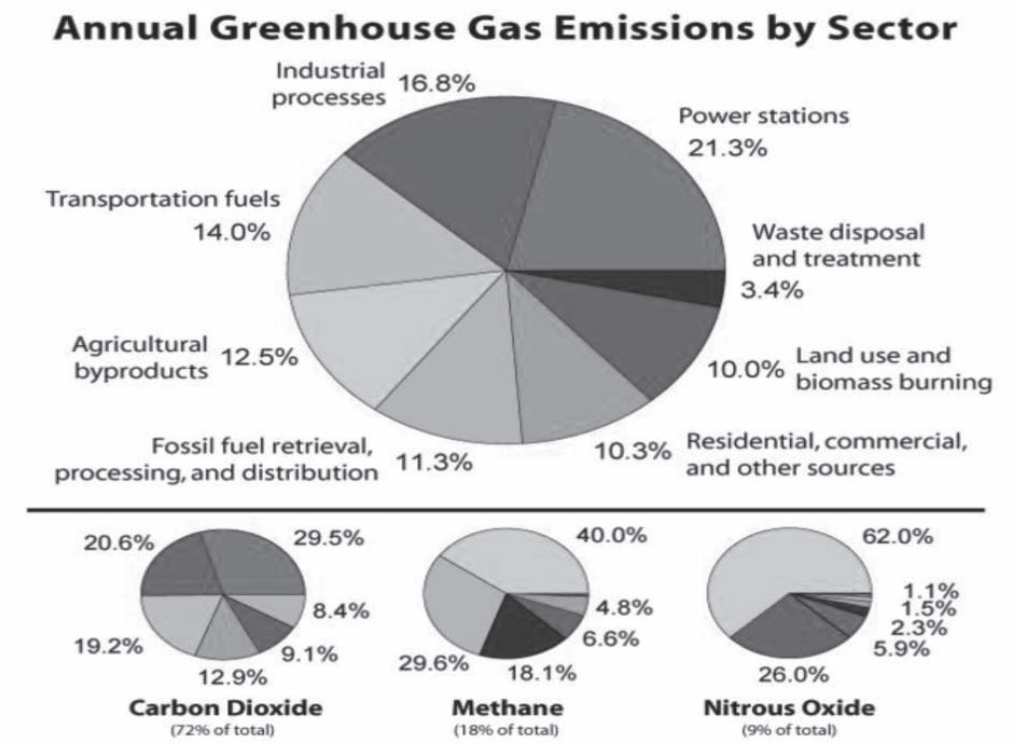
> The studies generally confirm the hypothesis that tropical and subtropical agriculture in developing countries is more climate sensitive than temperate agriculture. Even marginal warming causes damages in Africa and Latin America to crops. Crops are also sensitive to changes in precipitation. In semi-arid locations, increased rainfall is beneficial. However, in very wet places, increased rainfall can be harmful. If climate scenarios turn out to be relatively hot and dry, they will cause a lot of damage to farms in low latitude countries. However, if climate scenarios turn out to be relatively mild and wet, there will be only modest damages and maybe even beneficial effects. The magnitude of the damage depends greatly on the climate scenario.
>
> Small farmers are not necessarily more vulnerable than large commercial farmers. The livestock study in Africa found that small household incomes would rise with warming whereas commercial incomes would fall. Small livestock farmers have many options to switch crops and livestock that appear to make them less vulnerable than commercial live-stock operations that are more specialized. The study in South America found that small farmers are no less sensitive to warming than large farmers. Within developing countries, small farmers may well be less vulnerable than commercial farmers.
>
> Irrigation appears to be a very effective tool to counteract the harmful effects of either warming or drying. The incomes of irrigated farms are generally less vulnerable to warming than rain-fed farms and can even increase with warming. For example, irrigated farms in Africa and China are much less vulnerable to warming than rain-fed farms in those same countries. However, it is important to recognize that irrigation is constrained by the availability of water. If climate change reduces water supplies and increases water demand, water may become scarcer. Farmers may well find that they cannot pay for or obtain the water they

would need to irrigate. Farmers may be forced to switch from irrigated to rain-fed acreage. It is very important that analyses of agriculture in regions relying upon or considering irrigation examine watershed management as part of their analysis of the agriculture sector."

Activity 2.4

List five likely effects of climate change on developing countries.

Many people argue that the rural poor are exploiting the environment to such an extent that they are damaging it beyond repair. Taking into account the nature and extent of greenhouse gases in figure 2.3, it is very clear that the effects result more from urban activities than from rural ones. Yanda et al (2010) argue that rural communities that are dependent on natural resources have had less to do with climate change and, yet, that is where the effects lie.



Source: Rohde (2012)

Figure 2.3: Annual greenhouses gas emissions by different sectors

2.3.4 Carrying capacity

The 20th century has been marked by a profound historical development: an unwitting evolution of the power to seriously impair human life-support systems. Nuclear weapons represent one source of this power. Yet, even the complexities of global arms control are dwarfed by those inherent in restraining runaway growth in the scale of human enterprise, the second source of possible disaster (Regan 2012).

Carrying capacity can be explained as the maximum number of individuals that a given environment can support indefinitely without detrimental effects on the natural environmental. In other words, the carrying capacity of the environment or an ecosystem is the threshold limit of use of that system without damaging the system. Every ecosystem has its resources that are used for economic development, for survival and for habitat creation. Environment and ecosystems have the ability to recover the loss of their resources by regenerating them over periods of time that are temporary and by not exceeding the threshold damage limit.

Ecologists define carrying capacity as the maximal population size of a given species that an area can support without reducing its ability to support the same species in the future. Specifically, it is "a measure of the amount of renewable resources in the environment in units of the number of organisms these resources can support" (Roughgarden 1979:305).

The following example will explain what this means in practice. Let us say that a small plot of land can provide enough food to support six people, year after year, without any deterioration in the condition of the soil. A seventh person settles on the plot and, after a few years, the crops are smaller than they used to be, there are fewer trees and some of the land is starting to erode. In this case, the original carrying capacity of the plot was six people, but is has now been reduced to four.

Although there has been considerable research into the capacity of regions to carry animal species, little has been done to measure and define their capacity to carry human life. A number of different things complicate the application of the term "carrying capacity" to human beings. Humans' per capita consumption of natural resources varies greatly, not merely from one region to another, but from one person to the next. Human beings are, moreover, able to exercise considerable control over the natural resources on which they are dependent, for instance, through technological inventions, which increase production. In addition, they can trade and obtain resources from other areas that are not available locally.

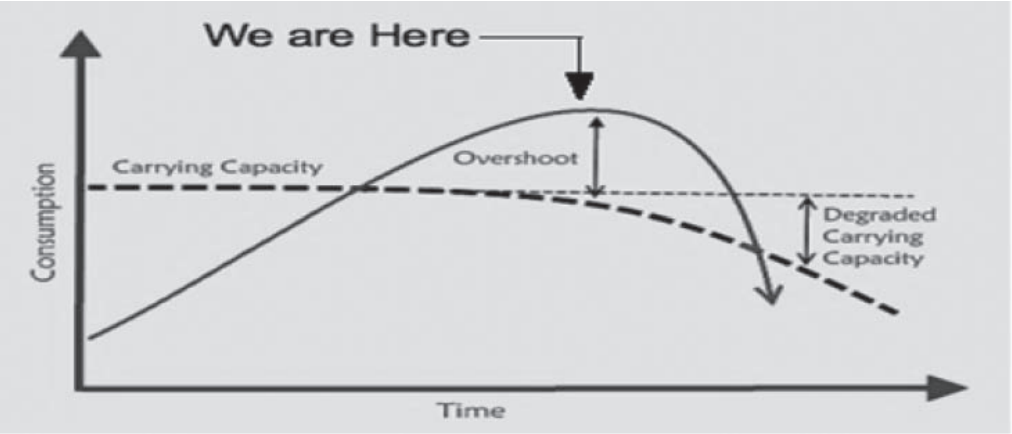
Let us think here, for instance, of fertilisers. This is not only a technological innovation, but also an important resource which is brought into an area. By using fertilisers people have dramatically increased the land's carrying capacity. Hammond (in Greenwood 1993:192) writes: "On average the yield per hectare of cereals, man's main food, has increased by 44% in developing countries during the period 1970–1990."

This increase can be directly linked to an increase in the use of fertilisers in these parts of the world. This shows us that people's activities in agriculture can have a positive effect on the soil and on agricultural production; in other words, on the number of people that a piece of land can carry or comfortably feed. However, as we shall see in this study unit, some of the ways in which people use land can also be harmful and can have a negative impact on development.

Human beings do not always have a positive impact on the carrying capacity of a region. Through poor environmental management strategies, they can actually lower it, thus depleting the natural resources in the long run. Often, such depletion – characterised by deforestation, desertification and soil erosion – is a direct result of population pressure.

When population growth puts excessive pressure on a region or even country, it may prevent development, or make it much more difficult. This could also be explained as the overshoot of the population. If population numbers match the carrying capacity of a region to the extent that all the available resources have to be used to support that number of people, production is used exclusively to cater for immediate needs and there is no surplus for future consumption.

To overshoot means to grow rapidly beyond the limits of carrying capacity. When this overshoot occurs, it's due to a limit or barrier exceeded within the system, and the system (natural and/or economic) corrects and begins to slow, stop or reverse growth. In addition, as the limits of our natural systems are exceeded they are degraded, which results in the overall carrying capacity being diminished. Overshoot leads to a sudden and catastrophic collapse.



Source: Rees (2008)

Figure 2.4: Carrying capacity

Figure 2.4 shows that if the environment is degraded, carrying capacity actually shrinks, leaving the environment no longer able to support even the number of people who could formerly have lived in the area on a sustainable basis. No population can live beyond the environment's carrying capacity for very long (Rees 2008).

2.4 NATURAL RESOURCES MANAGEMENT

Natural resources include commodities such as land, soil, water, plants and minerals. All natural resources come from the earth and are not manmade products. Natural resources have often played a key role in conflict throughout the world. Some of these natural resources can be restored, but others cannot be restored by natural processes. Thus, it is important to distinguish between renewable and non-renewable resources, within the whole discourse of sustainable development that delivers basic environmental, social and economic services to all without threatening the viability of the natural, built and social systems upon which these services depend. In other words, the effective protection, the prudent use and the maintenance of natural resources are crucial for the sustainability of these natural resources.

2.4.1 Renewable resources

Renewable resources are natural resources that can be replenished in a short period of time. In other words, renewable resources are sources of energy that can be re-used and continue to be used regardless of how people consume them. Examples are solar energy, wind energy, biomass and geothermal energy.

2.4.2 Non-renewable resources

Non-renewable resources are natural resources that cannot be re-made or re-grown on a scale comparable to their consumption. Examples are: oil, coal and natural gas. Generally, these resources are called fossil fuels.

2.4.3 Mineral resources

Africa produces a large proportion of the world's supply of several minerals that are economically and strategically important. For some decades now, Europe has depended on Africa to supplement its mineral supplies, and the US and the Far East are also relying increasingly on imported minerals. The mining of economically viable minerals is of tremendous importance for African development. In many parts of the continent – notably East Africa – there are no large mineral deposits.

2.4.4 Conventional energy resources

Africa is relatively well off with regard to conventional energy resources – that is, oil, gas, coal and hydroelectricity. Africa also has the potential to meet its energy needs by means of renewable resources such as sun and water. The continent has about 8% of the world's oil reserves as well as plenty of coal.

Despite this, Africa consumes remarkably little energy. With the exception of South Africa, the African continent, home to over 10% of the world population, accounts for a mere 2% of world consumption of conventional energy. South Africa alone accounts for over 25% of Africa's total energy consumption (Timberlake 1985:113). South Africa has over 43 billion of the continent's estimated 50 billion tons of technically and economically extractable coal. Apart from South Africa, Zimbabwe is the only other African country that uses coal extensively as a source of energy. Botswana and Swaziland also have coal deposits, and so do Angola and Tanzania, although to a lesser extent.

Although these countries' resources are small compared with those of South Africa, they are on the whole adequate for local energy needs. Countries that do not have sufficient sources of conventional energy, spend large amounts annually on importing their requirements. Tanzania sacrifices 50% and Kenya 63% of annual export revenues to purchase energy (Timberlake 1985:53). In poor African countries, trees – in the form of firewood – supply over 70% of the energy requirements.

2.5 MINING AND SUSTAINABLE DEVELOPMENT

Sustainable development implies that both current and future generations have rights over resources, needs and decision-making. In terms of mineral resources,

the following questions that pertain to the link between mining and sustainable development need to be interrogated:

- Who decides on the use, exportation and perhaps importation of mineral resources from developing to developed countries? Should it be government, private industry or the free market system?
- Why do we export mineral resources and why do we import manufactured products? Are these sustainable for developing countries?

Activity 2.5

Answer the following questions:

1. Does mineral extraction mean something different in developed and developing countries?
2. Is it possible to have sustainable development, sustainable economic growth and sustainable communities without mining?
3. What is the role of mining in sustainable development?
4. Who are the largest extractors of minerals in South Africa?

Table 2.2 shows mineral exports from South Africa to be more than 57.3% of total exports to the US, with six of the top ten export commodities from South Africa to the US derived from mining activities. Similarly, South African exports to the EU are mineral products (21%), precious and semi-precious metals and stones (18%), base metals (4%), and machinery and mechanical appliances (14%). Minerals and metals thus comprise 54% of South Africa's exports to the EU.

Table 2.2: Top 10 exports from South Africa to the US

	Commodity	**Value US$ million**	**% of total exports to US from RSA**	**Increase % from 2005**
1	Precious metals (other than gold)	2.7 billion	35.8	44.5
2	Diamonds	947	12.4	26.4
3	Unmanufactured steel	528.4	7.0	20.6
4	Aluminium	369.6	4.9	23.0
5	Automotive parts and accessories	321	Na	na
6	New and used passenger cars	320.7	4.3	165.8
7	Miscellaneous non-ferrous metals	315.2	4.2	13.4
8	Semi-finished iron and steel mill products	287	3.8	79.5

9	Industrial organic chemicals	248.2	3.3	1.7
10	Items returned to US then re-imported	108.6	1.4	(down)7.9

2.6 PROBLEMS AFFECTING SUSTAINABLE DEVELOPMENT

2.6.1 Pollution

Pollution can be defined as the contamination of air, soil and water by the discharge of harmful substances from the atmosphere. Miller (2005:435) defines pollution as "the presence of chemicals in the atmosphere in concentrations high enough to affect climate and harm organisms and materials".

The effects of airborne pollutants range from aggravating to lethal. Air pollution is not a new phenomenon. Throughout human history, anthropogenic activities have added various types of pollutants to the troposphere. Burning oil, gasoline and natural gas also add pollutants to the atmosphere, which can reach harmful levels in the troposphere. This is particularly true in urban areas where people, cars and industrial activities are concentrated (Miller 2005). Because of population pressure, pollution is increasing in African countries.

Toxic waste, which is a product of urbanisation and increasing industrialisation, has already made an impact in various industrialised countries. Today, its effects are also being felt in developing countries. In the 1950s and 1960s several people died in Japan and hundreds were left paralysed or crippled after they had eaten contaminated fish – a situation caused by a chemicals factory which released mercury into Minamata Bay (Seitz 1988:127). Toxic gases are equally dangerous. Consider the Bhopal incident in India in 1984: toxic gases were accidentally released, killing 2 000 people and injuring another 200 000.

Scholars classify outdoor air pollutants into two categories: primary and secondary pollutants. Primary pollutants are those emitted directly into the troposphere in a potentially harmful form, for instance carbon monoxide, sulphur dioxide and nitrogen oxides. With their concentration of cars and factories, cities normally have higher outdoor air pollution levels than rural areas; these are secondary pollutants such as ozone and hydrogen peroxide. Nevertheless, prevailing winds can spread long-lived primary and secondary air pollutants from urban and industrial areas to the countryside and to other urban areas (Miller 2005).

Even though the key air pollutant sources vary among countries, certain source types are predominant in certain economies and sub-regions. In general, key sources include the industrial sector (thermal power stations, smelters, cement factories, chemical industries), the transport sector, forest/savannah fires, domestic fuel use and waste burning. The emissions from these sources have impacts on human health, ecosystems on which livelihoods depend, materials and infrastructure, climate change and biodiversity.

Another cause of pollution in Africa is the misuse of pesticides. Properly used, these can be extremely effective, but often too much is applied and the necessary precautions are not taken. This kills the natural predators of insects as well as the insects that pollinate crops; in addition, it encourages the evolution of insects that are resistant to the pesticide. Pesticides that end up in rivers or lakes cause the death of fish and annually poison some 500 000 people who draw their water from polluted sources (Kirchner, Ledec & Goodland 1985:78).

Increasing air pollution is another side-effect of rapid urbanisation and the accompanying growth in population. The burning of fossil fuels, such as coal, creates sulphur dioxide, which returns to earth in the form of acid rain and adversely affects the natural environment. Blue-green algae, which is an important source of nitrogen in rice paddies, is one of the plant forms that reacts unfavourably to acid environments (IUCN 1987:50).

Since these and other forms of pollution tend to be localised, they can be controlled, provided sufficient funds are channelled into appropriate machinery and technology. Remedies for pollution require considerable capital, scientific and administrative expertise, and these are often in short supply in developing countries.

2.6.2 Deforestation

Trees are the most important aspect of the planet's life and they are vital to the environment, animals and, of course, to us humans. They provide significant ecosystem services such as water storage and retention, erosion control, carbon sequestration and food production. The forest cover plays an important role in generating a natural habitat for wildlife as well as improving and regulating the amount of precipitation within an area.

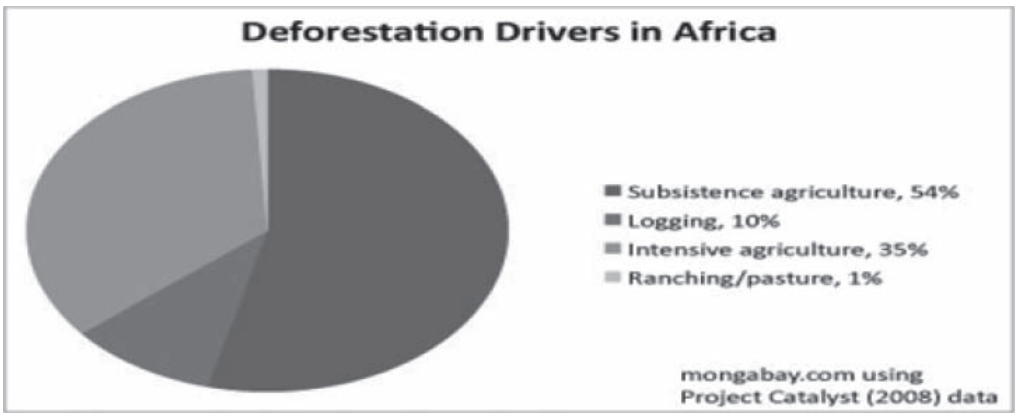
According to some estimates, more than 50 percent of the tree cover worldwide has disappeared due to human activity. Population pressure in the Third World leads to deforestation on a massive scale. Deforestation, which is the indiscriminate destruction of indigenous plant life, in turn, causes acute human suffering by reducing the carrying capacity of the soil and thus impairing the long-term prospects for sustained development in many areas.

The demand for firewood perpetuates the problem of deforestation. In Africa, firewood is used at a tremendous rate and any shortages affect the lives of the rural poor in a seriously negative way. For example, in some parts of West Africa, households traditionally cooked two meals a day. Now that wood has become scarce, families can often cook only one meal a day or only one meal every second day. The shortage of firewood impacts negatively upon households that depend on it to heat food and boil water and also exposes these households to the spread of diseases.

Isolated trees in the countryside are an important source of firewood and it is particularly difficult to prevent their destruction. Such trees fulfil a vital function, since they help to control wind and water erosion and slow down the run-off of rainwater. Their wood may also be used to make implements and household articles and, the same trees, may provide food such as fruit and nuts. The destruction of these trees makes the environment more vulnerable to erosion, reduces soil fertility and removes an important source of food.

The consequences of chopping down trees for firewood are most noticeable close to cities and large rural settlements. Trees on communally-owned or readily accessible land are disappearing altogether. Kano, in northern Nigeria, is an example of a place where chopping down trees for consumption in urban areas has had an impact on rural areas for miles around. In the past, the farmers used to chop branches off trees and cart them to the cities on donkeys to sell. They then collected manure and rubbish from the city streets and used this to fertilise their fields. This system came to a halt when the land, within a radius of 40 kilometres around Kano, had no more trees left.

Deforestation is caused by a number of factors which vary from region to region. In Latin America and South-East Asia, deforestation is generally the result of industrial activities, notably cattle ranching in the Amazon and large-scale agriculture and intensive logging in South-East Asia. In Africa, subsistence agriculture, often using slash-and-burn or fallow techniques, is the most important cause of forest loss in Africa.



Source: Butler (2011)

Figure 2.5: Deforestation in Africa

Figure 2.5 illustrates the main drivers of deforestation in Africa, with agriculture contributing to over 89 percent. Forests are cut down in order to create land for growing crops and building farms, ranches and other food-growing lands. The destruction of these forests results in loss of biodiversity and exposes the soil to the sun, rainfall and wind, which all erode the soil. Moreover, groundwater tables are affected and, in some cases, depleted, disrupting the water cycle. Since deforestation has a direct association with carbon dioxide emissions into the atmosphere, there is an overall effect of global warming. The annual destruction of 13 million hectares of forest accounts for nearly one-fifth of global greenhouse gas emissions, a greater share than all the world's trucks, cars, ships and airplanes combined (Butler 2011). Controlling deforestation is imperative to addressing climate change.

Activity 2.6

Watch the videos at https://www.youtube.com/watch?v=M4jhjt1_eyM or at https://www.youtube.com/watch?v=aYDauYlUGG4

Summarise the effect of deforestation on development in developing countries.

2.6.3 Soil erosion

The soil covering the earth's surface has taken millions of years to form. This soil is formed at a rate of only 1 cm every 100 to 400 years; it takes 3 000 to 12 000 years to build enough soil to form productive land (NDA 2008). Food production is entirely dependent on the soil and the level of its productivity; soil is also necessary for biodiversity and is a custodian of mineral wealth.

Human activities have resulted in a significant loss of soil nutrients and the depletion of soil organic matter. Soil erosion occurs when soil is removed through the action of wind and water at a greater rate that it is formed. This is one form of soil degradation; others are soil compaction, low organic matter, loss of soil structure, poor internal drainage, salinisation and soil acidity problems.

However, humans are not entirely responsible for this degradation; it is also attributable to a number of natural processes. Agents like water and wind both contribute to a significant amount of soil loss each year. The process of soil erosion can be slow and continue unnoticed or it may occur at an alarming rate, causing serious loss of topsoil. The likelihood of soil erosion is increased if the soil has no or very little vegetation cover (plants or crop residue), because soil that is not protected by vegetation cover or where there are no roots to bind the soil is easily washed away by rain.

2.6.4 Desertification

Desertification is the process of land degradation in arid, semi-arid and dry sub-humid areas. It is caused by various factors such as climatic variations and anthropogenic activities (e.g. over cultivation, overgrazing and deforestation).

Desertification is one of the international environmental problems and its importance and associated impacts have been acknowledged by both scholars and international communities. For instance, the United Nations Convention to Combat Desertification is one of the strategies that have been put in place at the international level since 1991 and 1992, when the UNCD was held in Rio de Janeiro. Desertification has potentially adverse impacts on both human beings and the natural environment. These impacts range from soil erosion (either by wind or water) to reduction in species diversity and plant biomass and the overall productivity of dry-land ecosystems.

Desertification is also related to the process of systematic deforestation. Deforestation has always been a practice of many developing communities and has contributed greatly to civilisation as we know it today. Unfortunately, much of the ill-effects of deforestation are caused by greed, bad agricultural practices and government neglect. Apart from their beauty, forests are highly important in keeping and sustaining global ecosystems. In fact, much of the quality of life we enjoy, we owe to the forests. They are also home to more than half of all creatures and organisms on this planet. From food to life-saving medicines, forests give humans a variety of gifts that contribute much to our quality of life.

2.6.5 The positive side of deforestation

Depending on the needs of the social group concerned, deforestation has made it possible for communities to be built. Forests make way for residential houses, office buildings and factories. Governments are able to build roads to make trade and transport easier and, therefore, more convenient to residents.

Deforestation can also mean the conversion of forest land to productive land for agricultural uses. This results in better and more abundant production of food and materials, virtually eradicating periods of want and lack. Economically, deforestation has contributed much to giving many communities the opportunity to make positive changes in their lives.

2.6.6 The negative consequences of deforestation

Unfortunately, the negative consequences of deforestation far outweigh its positive effects.

Here are a few of them:

- When forests are cleared, soil cover, which consists mainly of vegetation, is removed as well. This exposes the bare soil to extreme conditions produced by the sun's heat and rainwater. Under these alternating impacts, the soil quickly compacts.
- Rainwater washes out the nutrients and other organic materials that make the soil rich and fertile.
- Add to that the frequent activities of tilling, cropping and grazing, and the soil's quality is gradually degraded.
- These practices are specially a concern in areas where forest zones are drier.
- Agricultural practice on top of deforestation can result in the desertification of many areas. Desertification is also a direct result of the demand for the soil to produce more (as a consequence of the increase in human population), thereby decreasing the land's carrying capacity to a significant degree.
- Another result of deforestation is watersheds that are no longer able to sustain and regulate water flows from rivers and streams.
- Trees are highly effective in absorbing water quantities, keeping the amount of water in watersheds at a manageable level.
- The forest also serves as a cover against erosion.
- Once trees are gone, too much water can result in downstream flooding, which has caused disasters in many parts of the world.
- As fertile topsoil is eroded and washed into the lower regions, many coastal fisheries and coral reefs suffer from the sedimentation brought by the flooding.
- This has negative effects on the economic viability of many businesses and causes destruction of the wildlife population.
- Most of the areas that have undergone deforestation are actually unsuitable for long-term agricultural uses such as ranching and farming.
- Once deprived of their forest cover, the lands rapidly degrade in quality, losing their fertility and arability.
- The soil in many deforested areas is also unsuitable for supporting annual crops.
- Much of the grassy areas are also not as productive as more arable soils and are therefore not fit for long-term cattle grazing.
- When governments implement deforestation, mainly to open up areas for "civilised" communities, access to forest resources by indigenous peoples is ignored.

- In fact, indigenous peoples are scarcely included in economic and political decisions that directly affect their lives.
- Deforestation ignores their rights as much as it takes away the resources that their ancestors have bestowed upon them.

Activity 2.7

Answer the following questions:

1. What are some of the problems affecting sustainable development in your region/area?
2. What are the positive and negative effects of deforestation for both developed and developing countries?
3. To what extent is soil erosion an obstacle to the success of sustainable development?

2.7 CONCLUSION

In the above discussion of sustainable development, we stressed that the protection of natural resources and ecosystems, in general, is very important to maintain lifecycles and to preserve natural resources that sustain current and future generations. In addition, sustainable development encompasses a wide range of aspects that need to be taken into account. Achieving sustainable development is complex and depends on multifaceted factors that are interrelated.

2.8 OUTCOMES CHECKLIST

Question	Can do	Cannot do
(1) Explain the meaning of sustainable development.		
(2) Identify the main obstacles to achieving sustainable development.		
(3) Describe the connection between sustainable development and (a) soil erosion (b) deforestation (c) desertification		
(4) Write your own definition of sustainable development.		

Study Unit 3

BASIC NEEDS AND DEVELOPMENT

OUTCOMES

After studying this unit, you should be able to:

- define basic needs in relation to other needs and wants
- explain why these needs differ within families, cultures, countries and regions
- describe the link between shortage and failure to access basic needs and the lack of development
- explain why some needs are more urgent than others

3.1 INTRODUCTION

In the previous unit, we discussed sustainable development and noted it is an important factor in ensuring that development is pursued in a way that ensures a safe future for generations to come. In this study unit, we will look at basic human needs. You will notice, as you read on, that there is a link between human rights and basic needs. You will also notice that basic needs can exist where human rights do not exist. Think about prisoners, for instance: would you say they enjoy all human rights? Do they have access to their basic needs? The answer is that they do not necessarily enjoy all human rights, yet they get most or all of their basic needs.

3.2 WHAT ARE THESE BASIC NEEDS?

Activity 3.1

Think about all the things that you cannot live without. List them in order of their importance for your survival. What comes top on your list?

Feedback

A basic need can be defined as those things that a person cannot do without, for example, shelter, clothes, the air that we breathe or the water we need to quench our thirst, producing and preparing our food, bathing, cleaning and washing. Compare these examples with those on your list. Are there common examples? Do you still want to retain your list?

Now think about the things you use that you can survive without. List them.

These may be your wants.

Human beings also have what are called "wants". Wants are those things we can do without, but can still be necessary in our lives. Basic needs are, therefore, day-to-day requirements, while wants are luxuries; for example, basic clothes versus designer clothes. Examples of wants are television, ice-cream or flavoured water. Compare

these examples with those on your list. Are there common examples? Do you still want to retain your list or do you want to change some items into needs?

Basic needs can be interpreted in different ways, but they can be viewed objectively in terms of minimum specified quantities of such things as food, clothing, shelter, water and sanitation, which are necessary to prevent ill-health, undernourishment and so forth (Streeten 1984:974). They also include other necessities required by a community such as public transport, health, education and cultural facilities (Hoadley 1981).

Without these, life will be very difficult and the lack of one basic need can result in the lack of another; for example, without adequate water, it will be difficult to live in sanitary conditions. The basic needs discussed in this unit are: literacy, water, sanitation, work and food (hunger and nutrition).

3.3 BASIC NEEDS AND DEVELOPMENT

In a world with 7 billion people (United Nations Fund for Population Activities – UNFPA 2011), meeting basic needs can encounter many constraints. How will all the people get their fair share of adequate food and have land to build their shelters? Will there be enough jobs for everyone? In some countries, these questions are less frustrating than they are in other countries.

In other units, you learned about development indicators such as the under-five child mortality rate, GNP and HDI. Overall, these indicators can be said to be yardsticks for measuring the development stage of a country or region. Similarly, basic needs are yardsticks which show the capacity of a household, community, country or region to satisfy the needs of its people. A community that has no access to basic needs is a community in poverty.

The UN describes poverty in terms of a lack of basic means to survival. It (United Nations 1998) states:

> [P]overty is a denial of choices and opportunities, a violation of human dignity. It means lack of basic capacity to participate effectively in society. It means not having enough to feed and clothe a family, not having a school or clinic to go to, not having the land on which to grow one's food or a job to earn one's living, not having access to credit. It means insecurity, powerlessness and exclusion of individuals, households and communities. It means susceptibility to violence, and it often implies living on marginal or fragile environments, without access to clean water or sanitation.

In South Africa, like many other developing countries, poverty is viewed as having the worst effect on access to things that satisfy basic needs. Most of these, unfortunately, have to be paid for because everything has now been commoditised; money is needed to buy food and clothes and to pay for accommodation, school fees and water and sanitation services. Being employed has also become a need that is crucial for one to access other services. In a country where on the one hand population is ever-increasing, be it due to high fertility or immigration, and on the other there is no economic growth and, hence, no job creation, things that satisfy basic needs will continue to be scarce.

3.3.1 Linking development to access to basic needs

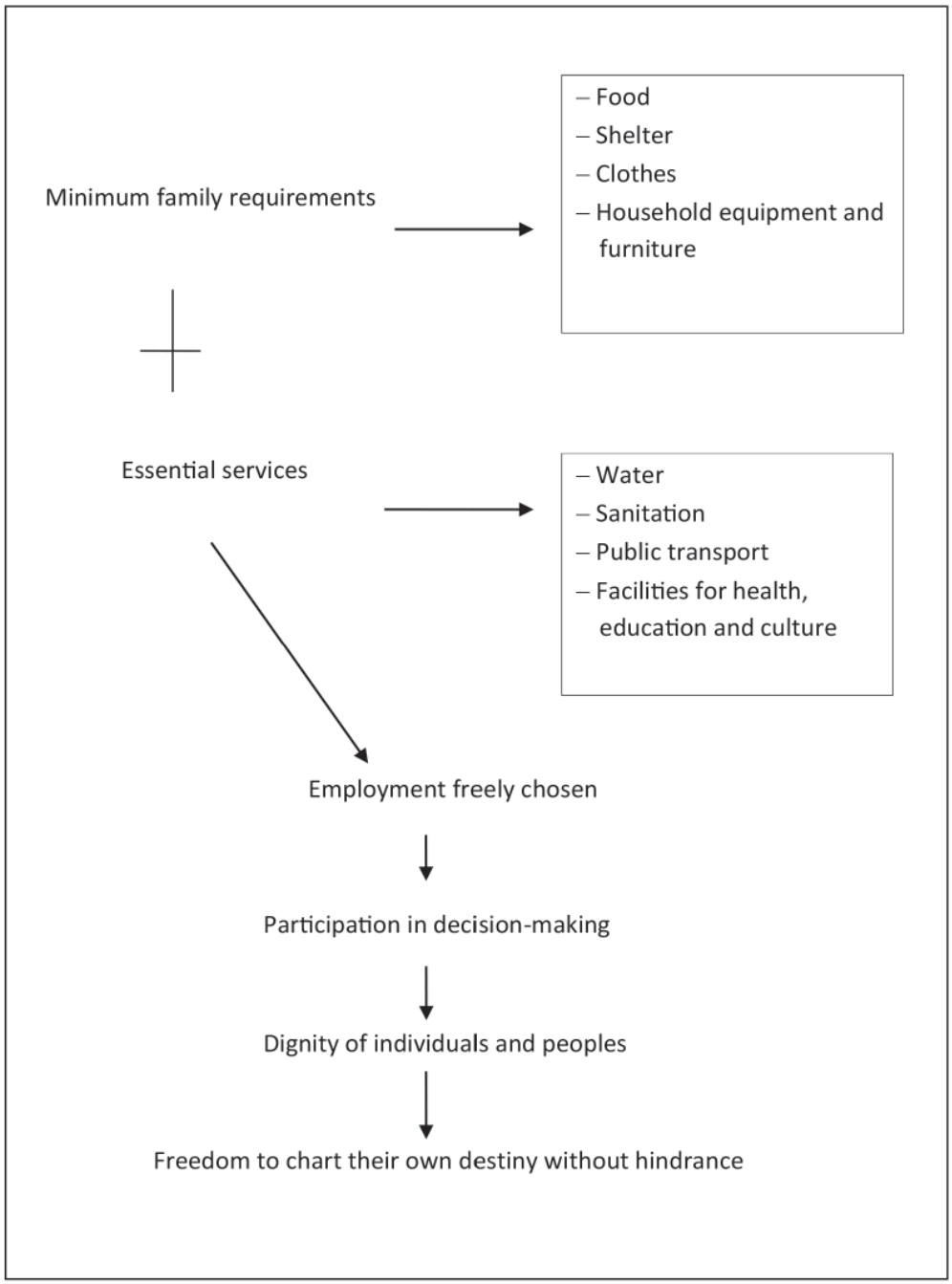
Development means different things to different people. However, the most important aspect of development is to bring positive change. This implies the right to improvement and advancement of economic, social, cultural and political conditions. In other words, improvement of quality of life means implementing change that ensures every person a life of dignity or life in a society that respects and helps realise all people's needs and ensures their human rights. These changes must include eradicating and alleviating widespread conditions of poverty, unemployment, and inequitable social conditions as well as improving human wellbeing by integrating social development, economic development and environmental conservation and protection.

Streeten (1984) and Hoadley (1981) mention food, clothing, shelter, water, sanitation, public transport, health, education, cultural facilities and security as the most basic needs people require in order to lead a dignified and fulfilling life. Can you picture a remote rural area that is hardly accessible by road, air or by telephone? People living in these areas may be able to access food and water and have shelter; but without access to schools and health centres, would you consider food, shelter and water as adequate for a well-balanced life? Such people would require other basics for their lives to be whole. Changes that will bring development into their lives such as access to healthcare will reduce mortality, especially that caused by preventable diseases.

What brings development is people's ability to access basics which would ensure they are not undernourished, they are secure in their homes, they have access to information through education and when their health fails, there is a health-care system that is able to cater for their ailments. In the study unit on development concepts, you learned that the world is divided according to a country or region's development status.

Development might mean different things to different people. However, in the basic needs approach, development is about improving and providing for basic needs in order to ensure the improvement of livelihoods and a life of dignity for the poor. Proponents of the basic needs approach believe that meaningful development and eradication of widespread poverty can be achieved through the provision of and access to basics and services. They argue that there are some needs which are more urgent than others.

In figure 3.1, the International Labour Organization (ILO) outlines basic needs. Which needs do you see as more urgent and why?



Source: Adapted from ILO (1976)

Figure 3.1: An outline of basic needs

You were probably thinking that everyone needs food, shelter and clothes, but that household equipment and furniture are probably not that urgent.

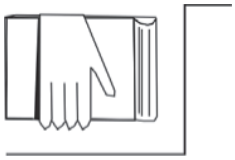
Perhaps not! But think of people living in urban areas; don't they need some basic furniture? Even in rural areas, people have their own type of basic furniture. Is it, however, urgent that people have basic furniture compared to their need for food, clothes, shelter and good health? What else can you add to the list of what you see as urgent basic needs? Think of an 18-year-old girl living in Alexandra township; would her urgent basic needs be similar to those of a girl of the same age living in Sandton?

Probably not. A person's social, economic and political environment will most likely affect what they need. Think of other factors that might determine urgent needs.

It is clear that urgent basic needs are those needs that enhance people's lives, which give them dignity and a sense of well-being. However, these needs change over time and are affected by not only the immediate social, economic and political environment, but the international environment as well.

Source: Image courtesy of http://beartoons.com

Figure 3.2: Differing needs



Activity 3.2

Consider how fast the world is changing and ask yourself if the definition of basic needs can be similar across different social classes, races, religions, gender, geographical and political divides. Look at the cartoon in figure 3.2 and write a short paragraph explaining how basic needs differ from one community to another. Does your community, or any community in your surroundings, experience similar situations as the one shown in the cartoon? Explain how.

Let us now look at some basic needs and some of the challenges in securing them.

3.4 FOOD (HUNGER AND NUTRITION)

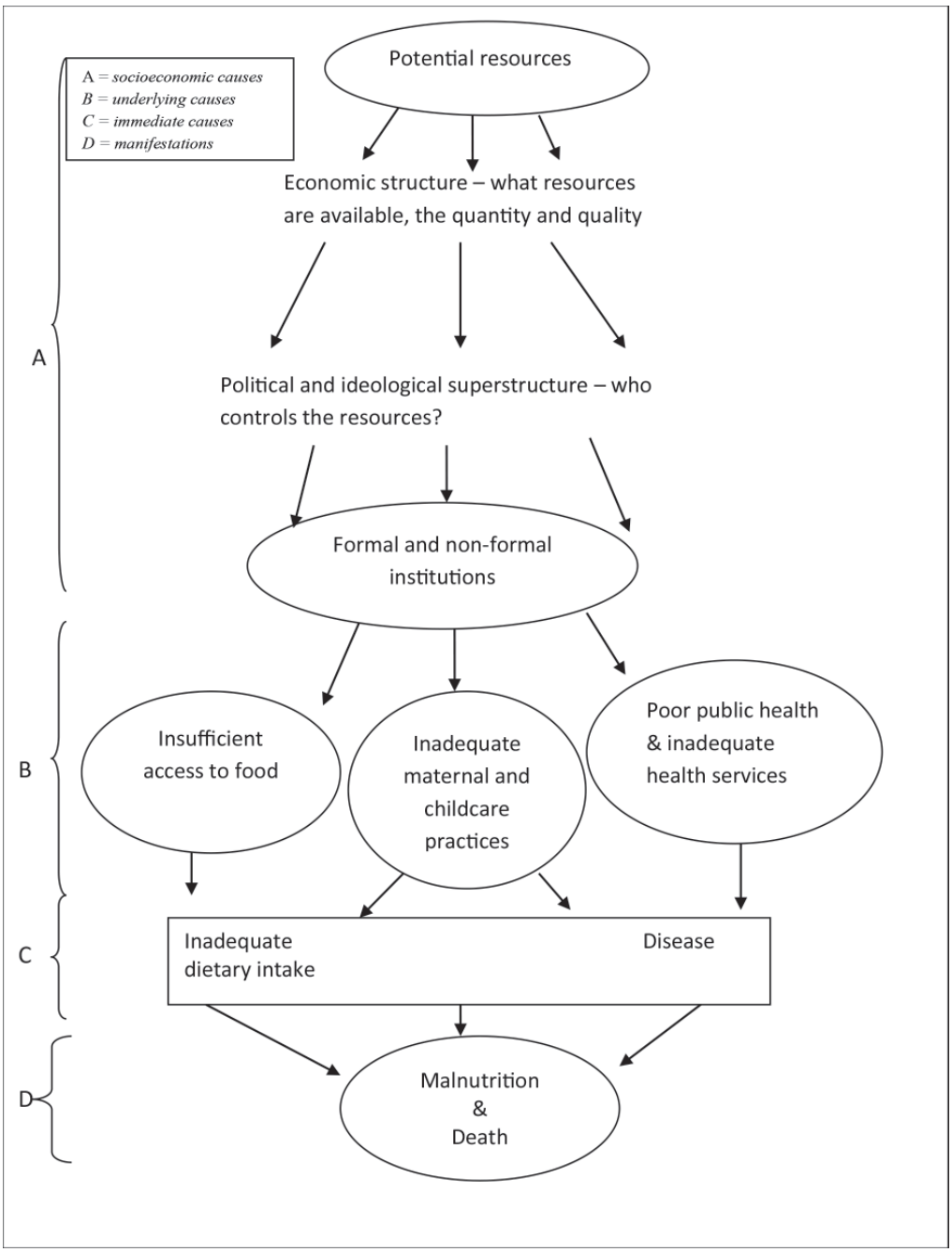
Food is a basic need without which a whole generation of humankind can be wiped out. If experienced to a less severe degree, food shortages can result in hunger and malnutrition. Food shortages are more prevalent in developing countries than in

developed countries. Figure 3.3 shows the interplay of different causes as they lead to malnutrition and loss of life.

There are many determinants of hunger, which can be social, political, economic or environmental. Social determinants of hunger can be those caused by individuals' need to lose weight or not eating for religious reasons and so on. Hunger of this type is not caused by food shortages, but by choices made by individuals or groups of people.

There is another level of hunger that is caused by a shortage of food or resources to get food. The underlying causes of this hunger could be political, economic or environmental. This type of hunger can be called "food insecurity" and is different from social hunger in that it is not just physical pain, but is also rooted in some underlying issues.

> [T]he prevalence of hunger is higher in rural areas – with fewer remunerative employment opportunities, more difficult access to markets, lower sanitation and hygiene standards, and less awareness of nutritional values – there may be an additional factor (i.e. rural/urban disparity) contributing to the overall prevalence of hunger (Gaiha, Kulkarni, Pandey & Imai 2011:5).



Source: Adapted from UNICEF (1990)

Figure 3.3: The complex causal pattern of malnutrition and death

READING BOX 3.1

WHO ARE THE HUNGRY?

Most of the world's hungry live in developing countries. According to the latest Food and Agriculture Organization (FAO) statistics, there are 925 million hungry people in the world and 98 per cent of them are in developing countries. They are distributed like this:

578 million in Asia and the Pacific
239 million in sub-Saharan Africa

53 million in Latin America and the Caribbean
37 million in the Near East and North Africa
19 million in developed countries

Rural risk

Three-quarters of all hungry people live in rural areas, mainly in the villages of Asia and Africa. Overwhelmingly dependent on agriculture for their food, these populations have no alternative source of income or employment. As a result, they are vulnerable to crises. Many migrate to cities in their search for employment, swelling the ever-expanding populations of shanty towns in developing countries.

Farmers

FAO calculates that 75 percent of the hungry people in developing countries, half are farming families, surviving off marginal lands prone to natural disasters like drought or flood. One in five belongs to landless families, dependent on farming, and about 10 percent live in communities whose livelihoods depend on herding, fishing or forest resources.

The remaining 25 percent live in shanty towns on the periphery of the biggest cities in developing countries. The numbers of poor and hungry city dwellers are rising rapidly, along with the world's total urban population.

Children

An estimated 146 million children in developing countries are underweight – the result of acute or chronic hunger (The State of the World's Children, UNICEF, 2009). All too often, child hunger is inherited – up to 17 million children are born underweight annually, the result of inadequate nutrition before and during pregnancy.

Women

Women are the world's primary food producers, yet cultural traditions and social structures often mean women are much more affected by hunger and poverty than men. A mother who is stunted or underweight due to an inadequate diet often gives birth to low birth weight children.

Around 50 percent of pregnant women in developing countries are iron deficient (UNICEF). Lack of iron means 315,000 women die annually from haemorrhage at childbirth. As a result, women, and in particular expectant and nursing mothers, often need special or increased intake of food.

Source: World Food Programme 2012 http://www.wfp.org/hunger/who-are

3.5 LITERACY

Life in the 21st century is becoming very demanding and literacy tops the list of the tools one needs for survival. Literacy means the ability to read and write. Do you agree that there is a relationship between literacy and development? Can illiterate people engage actively in activities that lead to development? Why/why not?

UNESCO (2008) has shown the link between literacy and development. It (UNESCO 2008:18) states:

> Literacy is a means for development**,** enabling people to access new opportunities and to participate in society in new ways. Literacy is also a right in itself – precisely

> because, without it, people will not have equal life chances. In societies today – both "developed" and "developing" – the pace of economic and social change is such that learning continues throughout life. Thus, the use of literacy must also change and adapt – for example, when bookkeepers have to handle complex computer programs rather than recording figures in a ledger, their literacy needs change. As society increasingly creates wealth by gathering information and processing it into useful knowledge, literacy demands also change.

It is mostly in sub-Saharan Africa and some parts of Asia where literacy rates are the lowest. UNESCO (1978:1) defines "a functionally literate person" as someone "able to carry out all the activities which require literacy, reading, writing, and calculating for the good functioning arid development of his or her group or community and for his or her own development". UNESCO also declares literacy to be a human right and as something that would have great economic value for the individual and the nation. Yet, what is the link between literacy and development? In this regard, Graff (1995:5) makes the point that literacy is linked to development; however, he cautions that improvement in the one, would not always lead to improvements in the other:

> [T]here has been no one route to economic development, industrialization, political democracy, or other parcels of the 'modernization' complex. In some cases, at some times, literacy worked as causal agent indirectly or directly. In others, it did not. In some circumstances, literacy was influenced by development, an effect rather than a contribution. And in others, the impact on literacy and education was negative — in European early industrialization, for example.

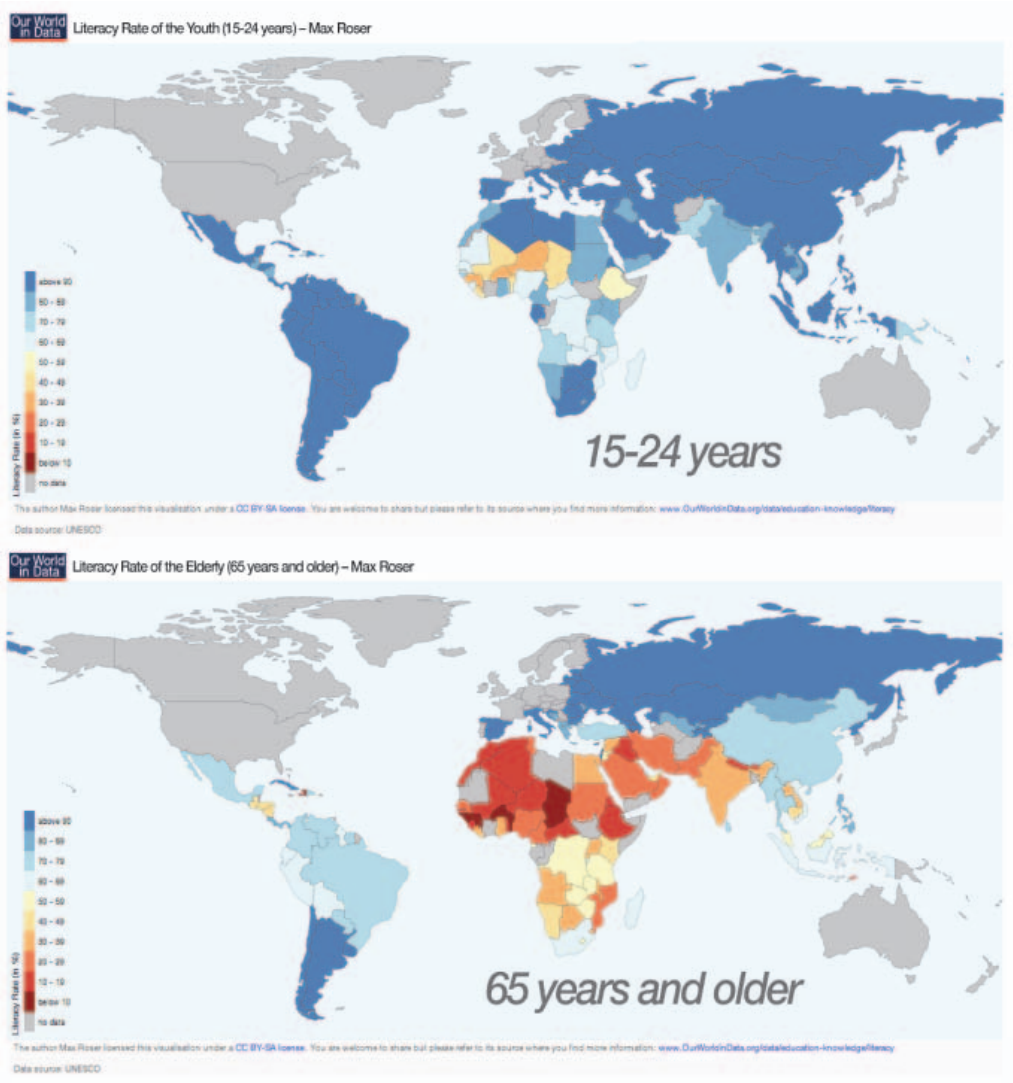
In figure 3.4, you will see a map depicting literacy rates. There have been vast improvements in literacy rates globally, but large inequalities remain with sub-Saharan Africa lagging behind. Countries with the lowest literacy rates (that is below 30%) are Burkina Faso, Niger and South Sudan (Roser & Ortiz-Ospina 2016).

There are various reasons for low literacy levels. The simplest reason of all is an inability to finance oneself through school. In many developing countries, a lot of people struggle to balance their most basic needs. In the end, a chance to become literate is thrown aside as it might not be seen as an urgent need. Developing countries also face big problems with infrastructure and other resources needed to run literacy centres. In most of these countries, there are many more schools in urban areas than in rural areas, so that illiteracy is mostly found among rural dwellers.

In some cultures, girl children are denied a chance to get an education on the basis that they are not permanent members of their birth families, as they will later get married. Reading Box 3.2 discusses statistics on gender disparities in literacy levels. In 2015, nearly two-thirds of the world's illiterate adults are women. As you would have seen in unit 1, the SDGs target gender equality and women's empowerment and aim to eradicate illiteracy and gender disparities in education by 2030. Under the MDGs, literacy rates have improved globally, but many older adults missed out on education programmes targeting the young. In 2015, 30% of women and 19% of men over the age of 65 years were illiterate (United Nations 2015).

The reasons behind children not attending school can be very different, but globally this is associated with poverty, social exclusion, living in a rural area or urban slum, conflicts and wars, lack of basic facilities and poor quality education. Some actions

taken to improve this include free primary schooling, larger education budgets and social cash transfers or grants to support poor families (United Nations 2015).



Source: Roser & Ortiz-Ospina (2016)

Figure 3.4: World map of literacy rates

READING BOX 3.2

GENDER DISPARITIES

Worldwide, the overall percentage of women who are illiterate has remained virtually unchanged in the last 20 years: 63 percent of the illiterate population were women in 1985–1994 as compared to 64 percent in 2000–2006.

The gender gap has improved most in the Arab States, and in South, West and East Asia. In sub-Saharan Africa, the female literacy rate has risen from 45 per cent to 53 percent, but the proportion of illiterate women within the total illiterate population has increased slightly, from 61 percent to 62 percent. Within specific countries, there are also considerable differences in women's and men's literacy rates according to geographical location. In Pakistan, the gender disparity in literacy rates is much greater in rural areas than in urban areas.

In South Asia as a whole, the gender gap in school enrolments is particularly evident in remote areas. Latin America and the Caribbean show contrasting trends to the other regions discussed, with only a small number of countries still showing disadvantages for women in accessing education, six countries showing parity and 18 countries where there are reversals of gender disparities with more girls enrolling in school than boys. Significantly, the Latin American countries with large indigenous communities (Guatemala, Peru and Bolivia) have lower literacy rates for women as compared to the population as a whole.

Source: UNESCO (2008:37)

Activity 3.3

1. Education and literacy are interlinked. Write one paragraph on what you see as the importance of education and literacy.
2. According to figure 3.4, which region has the highest literacy rates and what do you see as the causes?
3. Write down four ways in which you think regions with low literacy rates can improve.

3.6 WATER AND SANITATION

We all recognise that water and sanitation are necessary for good health. Clean and potable (drinkable) water is essential for human survival.

Sanitation is equally important, because unsanitary conditions can lead to ill-health. Massoud, Al-Abady, Jurdi and Nuwayhid (2010:24) note:

> Adequate and safe water is important for human health and wellbeing, economic production, and sustainable development. Failure to ensure the safety of drinking water may expose the community to the risk of outbreaks of waterborne and infectious diseases. Although drinking water is a basic human right, many people do not have access to safe and adequate drinking water or proper sanitation facilities.

South Africa is an example of a water-scarce country and adequate water for everyone is a difficult objective to achieve. In order to try and have basic water for everyone,

a policy of free water for everyone was introduced. By introducing the Free Water policy, the South African government was trying to do justice to its people by answering one of the major basic needs.

However, this policy has met with challenges, as, in many cases, poorer local municipalities fail to roll out the policy, as they do not have the financial and human resources required. In spite of South Africa having some municipalities that are unable to roll out the Free Water policy, South Africa is rated as one of the countries in the world to achieve between 91–100% in improved sources of drinking water.

Visit the website http://data.worldbank.org/indicator/SH.H2O.SAFE.ZS?view=map for a map showing global improvements in drinking-water sources. Can you see that Africa, mostly sub-Saharan Africa, is still struggling to have safe drinking-water sources?

Some of the reasons why Africa, and mostly sub-Saharan Africa, are still struggling can be attributed to:

- The difference between developed and developing countries, which leads to classifying countries as either First World, Third World or developing or developed world. (See study unit 1 for some key concepts.)
- The political situation of a country can derail previous achievements and take a country back many decades in terms of water and sanitation achievements. (Table 3.1 gives interesting facts and figures.)

Table 3.1: Access to water and sanitation

2.6 billion people do not use improved sanitation	**884 million people do not use an improved source of drinking water**
• Although 1.3 billion people have gained access to improved sanitation since 1990, the world is likely to miss the MDG sanitation target by a billion people. • Open defecation rates have decreased from 25% in 1990 to 17% in 2008. Worldwide, 1.1 billion people practice open defecation, a decline of 167 million since 1990 • With only 45% of the rural population using improved sanitation, rural areas lag far behind urban areas, where the rate is 76%. • Seven out of ten people, without improved sanitation, live in rural areas, but the number of people in urban areas without improved sanitation is increasing because of rapid growth in urban populations.	• The world is on track to meet the MDG drinking-water target. In developing regions, 84% of the population uses an improved source of drinking water. • In urban areas, the use of improved sources of drinking water has been maintained at 96% since 2000, with over 1 billion more people now using such a source than in 1990. However, this increase is barely keeping up with urban population growth. • The number of people living in rural areas, who do not use an improved source of drinking water, is over five times the number living in urban areas.

Source: WHO and UNICEF (2010)

3.7 WORK AND EMPLOYMENT

Activity 3.4

Reading Box 3.3 tells a basic needs story. After you have read it, write a paragraph about what you consider to be the most urgent need(s) in the story. Give reasons for your answer.

READING BOX 3.3

STRUGGLING TO HAVE AND MAINTAIN BASIC NEEDS: MOHAMMED SERUWO'S STORY

Mohammed Seruwo is forty-three years old and heads a family of nine children (three boys and six girls, two are grandchildren) in Uganda. His wife, Nakalanzi Jamildah, thirty-seven years old, operates a small retail shop started by Mohammed.

Before Mohammed became mentally ill, he was a successful farmer and businessman, trading predominantly in matooke, green or yellow bananas, vending great bunches of them on a bicycle. His business was very prosperous. It enabled him to marry, buy land for farming and begin to build a house for his family.

Life could not have been better. But, Mohammed fell sick in 2003 and was diagnosed with mania. He was unable to work, which made him very restless, but he refused to be hospitalised, because of the exorbitant cost. His family consulted traditional healers, but the illness persisted and Mohammed ended up selling almost everything he owned to pay the healers. He felt exploited. In despair over the property and money he had lost in his search for a cure, Mohammed became acquainted with Basic Needs Mental Health Clinic. He was given medication, which he took with extraordinary dedication. He responded well and stabilised. However, it was not easy for Mohammed to get over his tremendous loss and to resume meaningful work. His garden and compound had been abandoned because family members were unable to cope with the farming and having to look after him. His business and fine reputation was destroyed.

What helped him get back on his feet was the formation of a self-help group consisting of people with mental illness or epilepsy and their caregivers. The group, called Ani Yali Amanyi, initiated income-generating projects for livelihood development. Mohammed was elected to be the group's Treasurer, based on his past experience in managing and growing a successful business. Mohammed feels a sense of pride today in managing the finances of the self-help group that has: a poultry business with forty-seven laying chickens; six modern bee-hives that produce honey; a hybrid goat breeding centre; and commercial cultivation of a four-acre plot of land. The group is going strong, he says. As Treasurer, Mohammed keeps its fundamentals robust and performs his task with enthusiasm and skill.

Simultaneously, Mohammed got a job managing the local abattoir. It is a lucrative position with responsibility, secured through an independent and competitive bidding process. He also has his own independent family projects, which include farming, rearing animals and a profitable retail shop. With visible pride and excitement, he talks of introducing efficient management and accounting systems at his shop. His feeling of self-worth has returned, but Mohamed is typically self-deprecating about his recovery and economic success.

His humility endears him to the community that once disowned him because of his illness and the disgrace he brought to his family.

With the earnings from his businesses, Mohammed has completed his house, which was half-finished when the mental illness claimed him. He supports his children and their education, and supports his elderly mother. He consistently takes his medication and maintains a positive attitude – "The illness no longer bothers me." Mohammed's audacious streak in business, his determination to overcome the effects of mental ill health, his dependability and sense of responsibility has earned him respect in the community. He was asked to become a member of the Management Committee for St Joseph's Nakawanga Primary School. The school's head teacher said that he was chosen because he is a supportive parent to his school-going children, and he is keen to protect the school's assets. "When students do not close their classrooms, or leave their desks outside, he invariably puts the property back in the classrooms and secures them," the head teacher says. "To us this is an exceptional act of care and responsibility."

Mohammed had given up on life; he says he was looking forward to death. But now he believes he has the potential to move on, because he has developed personally and professionally, and is a respected member of the community. He looks at a future that has many prospects.

Source: Basic needs, basic rights. Available on: http://www.basicneedsus.org/our-stories/

Mohammed's story highlights the importance of employment as a basic need. When he fell ill, he lost this basic need as he was unable to perform as he used to. For those who took care of him, their basic need was for Mohammed to get well. His health was the most urgent need for them, as they did not think taking care of his garden in his absence mattered. Different circumstances thus rearrange the order of basic needs.

3.8 CONCLUSION

Basic needs are the things we need in our day-to-day lives. Without them, our lives are incomplete, worthless, less dignified or not dignified at all, or we may sink into absolute poverty. Basic needs vary depending on who you are and where you are. People in many countries in the South struggle to satisfy their basic needs; this can be due to internal or external forces.

Self-assessment questions

You have read about basic needs and how the failure to address them can be viewed as a lack of development. Now in your own words, explain briefly how and why the needs below may be more urgent in different communities.

Food

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Water and sanitation

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Literacy

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Work/employment

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.....

3.9 OUTCOMES CHECKLIST

Question	Can do	Cannot do
(1) Define basic needs.		
(2) Explain why different people in different communities have different needs.		
(3) Identify which needs are the most urgent.		

Study Unit 4

DEVELOPMENT, JUSTICE AND HUMAN RIGHTS

OUTCOMES

After you have completed this study unit, you should be able to:

- define and describe human rights discourses and various forms of justice
- describe the evolution of human rights within the context of development of international law
- identify the four generations of rights
- describe the connections between development, human rights and justice
- understand the ongoing debates on the universality and relativity of human rights

4.1 INTRODUCTION

The discourse of development is ever-changing, just like fashion. At the centre of development are challenges of underdevelopment, injustice, poverty, human insecurity and lack of rights. These issues are not caused by nature – they are caused by human actions and historical processes. As they are caused by human beings, they can also be solved by human action.

Africa is home to the largest constituency of poor people. This is not its natural state. A combination of human actions and historical processes, such as the slave trade, imperialism, colonialism, capitalism, neo-colonialism, apartheid, corruption and dictatorship, are responsible for underdevelopment, injustice and lack of human rights in some communities. This is not to deny that such natural calamities as famine, floods and droughts also contribute to underdevelopment and exposure to injustice and violation of rights.

The discourse of development in this unit is understood to mean liberation from underdevelopment, injustice, poverty, and violation of rights. Being developed, in this context, entails being free from slavery, imperialism, colonialism, apartheid, neo-colonialism, corruption and dictatorship. This is why this unit emphasises the connections between development, justice and human rights. There other thinkers and experts who understand development from a narrow economic perspective as referring to modernity, economic growth and affluence (wealth).

Affluence is the opposite of poverty: poor people do not enjoy justice and human rights. They are vulnerable to exploitation, violation and abuse, especially by the rich. The poor provide cheap labour for the rich, but they are often not paid enough to enable them to take charge of their lives.

In this unit, development is not viewed from a modernisation perspective. Advocates of modernisation, beginning with the work of WW Rostow, understood development as a linear process, which is technical, depoliticised, calculable, easily definable and predictable. In this thinking, Europe and the US are beacons of development. They have gone through linear processes and reached mature development.

Africa and other parts of the developing world have yet to go through definable stages of development to reach where Europe and the US are today. The main problem with this thinking is that it creates an impression that underdevelopment is a natural stage in the development process. It ignores the fact that underdevelopment and poverty are caused by human actions and unjust historical processes.

For over five decades, Africa has attempted to pursue development by copying the Western experience. This attempt has been dubbed the "catching-up" process. Africa has not succeeded in this process for a number of reasons, the most important being that Europe and Africa have not experienced similar historical processes. For development to be sustainable, it must take into account the histories, sociologies and cultures of Africa. Another reason is that development experts and institutions like the World Bank and International Monetary Fund (IMF), which took an active part in initiatives to develop Africa, used research methodologies and techniques informed by Western experiences. Consequently, they asked the wrong questions altogether, or asked correct questions, but spoke to the wrong people. Their prescription did not take into account historical realities and structures that generate poverty and injustice and deny enjoyment of human rights. Eventually debates on development in Africa became dominated by "much talking at, talking on, talking past, and talking to, but little talking with the African masses" as targets of development (Nyamnjoh 2006:395).

What the underdeveloped parts of the world, particularly in Africa, are fighting for is not modernisation, but justice, rights and a holistic-human-centred development. A holistic-human-centred development is one that does not seek to make Africans copycats of Westerners, but is informed by the principles of human rights, social and economic justice. A justice-based and human-rights-informed development discourse would not tolerate slavery, imperialism, colonialism, apartheid, corruption and dictatorship. Such a development discourse is poised to succeed in eradicating poverty and opening the way for a new world order of happiness, equality, rights and justice for all. But such a world order cannot come about without struggles by the poor in alliance with those groups of people who are genuinely committed to seeing poverty become history.

In this study unit on development, justice and human rights, we start by examining the debates on the meaning of human rights, the evolution of human rights as part of international law and the controversies surrounding the right to development.

The study unit then explores human suffering and the duty of the world to alleviate poverty from the perspective of justice and its linkages with development.

4.2 INTRODUCING DEVELOPMENT AND HUMAN RIGHTS

Fathers of liberalism like John Locke and Thomas Hobbes originated the theory of human rights as a natural phenomenon. They became well known for **the theory of natural rights**. They understood human rights as innate in every human being. For them, human rights did not arise from a social contract between the people and the state.

The basics of the theory of natural rights are, in a nutshell, that all human beings are equal and they have **inalienable rights** (rights that cannot be taken away by anyone).

The natural theory of human rights is the oldest debate on human rights. It is clearly represented today by the ideas of Jack Donnelly (1993:35), who argues:

> The very idea of human rights does entail a certain individualism. Human rights are those that one has simply as a human being, irrespective of one's membership or place in society … each person, regardless of status or past actions, has certain fundamental human rights that ordinarily take priority over other moral and political claims and obligations. The idea of human rights, in other words, implies that there is a certain irreducible moral value in each individual being.

The theory of natural rights is a precursor to **the universalist theory of human rights**. This theory is sometimes called the Athens-to-Washington-narrative of human rights. It was given this name because it traces the origins of human rights to the Greek city states (Athens) and locates the maturation of human rights in Washington (US). It is a simple theory that builds a natural theory of rights and emphasises that human rights are rights that human beings possess by virtue of being human, irrespective of such distinctions as sex, gender, ethnicity, race, religion, age and generation. What is emphasised is the common issue of equality of human beings. People are born equal and with rights. It was this universalist concept of human rights that informed the **Universal Declaration of Human Rights** (UDHR) in 1948.

Universalists predicated human rights on the universal nature of human beings (the "state of nature", to borrow Thomas Hobbes' term).

In Reading Box 4.1, the UNFPA's description of human rights and their universal properties are listed.

READING BOX 4.1

THE PROPERTIES OF HUMAN RIGHTS AS DEFINED BY THE UNFPA

Human rights are universal and inalienable; indivisible; interdependent and interrelated. They are universal because everyone is born with and possesses the same rights, regardless of where they live, their gender or race, or their religious, cultural or ethnic background. Human rights are inalienable because people's rights can never be taken away. It is indivisible and interdependent, because all rights – political, civil, social, cultural and economic – are equal in importance and none can be fully enjoyed without the others. They apply to all equally, and all have the right to participate in decisions that affect their lives. They are upheld by the rule of law and strengthened through legitimate claims for duty-bearers to be accountable to international standards.

Universality and inalienability: Human rights are universal and inalienable. All people everywhere in the world are entitled to them. The universality of human rights is encompassed in the words of Article 1 of the Universal Declaration of Human Rights: "All human beings are born free and equal in dignity and rights."

Indivisibility: Human rights are indivisible. Whether they relate to civil, cultural, economic, political or social issues, human rights are inherent to the dignity of every human person. Consequently, all human rights have equal status, and cannot be positioned in a hierarchical order. Denial of one right invariably impedes enjoyment of other rights. Thus, the right of everyone to an adequate standard of living cannot be compromised at the expense of other rights, such as the right to health or the right to education.

Interdependence and interrelatedness: Human rights are interdependent and interrelated. Each one contributes to the realisation of a person's human dignity through the satisfaction of his or her developmental, physical, psychological and spiritual needs. The fulfilment of one right often depends, wholly or in part, upon the fulfilment of others. For instance, fulfilment of the right to health may depend, in certain circumstances, on fulfilment of the right to development, education or information.

Equality and non-discrimination: All individuals are equal as human beings and by virtue of the inherent dignity of each human person. No one, therefore, should suffer discrimination on the basis of race, colour, ethnicity, gender, age, language, sexual orientation, religion, political or other opinion, national, social or geographical origin, disability, property, birth or other status as established by human rights standards.

Participation and inclusion: All people have the right to participate in and access information relating to the decision-making processes that affect their lives and well-being. Rights-based approaches require a high degree of participation by communities, civil society, minorities, women, young people, indigenous peoples and other identified groups.

Accountability and rule of law: States and other duty-bearers are answerable for the observance of human rights. In this regard, they have to comply with the legal norms and standards enshrined in international human rights instruments. Where they fail to do so, aggrieved rights-holders are entitled to institute proceedings for appropriate redress before a competent court or other adjudicator in accordance with the rules and procedures provided by law. Individuals, the media, civil society and the international community play important roles in holding governments accountable for their obligation to uphold human rights.

Source: UNFPA (2005).

The key criticism levelled against universalists is that, while they derive their theory from that of naturalists, who believed in natural human rights, they also accept that human rights are rooted in Western civilisation and Western philosophy. This is a contradiction. If human rights are natural and universal, how can they be rooted in one civilisation? The logical argument would be that human rights exist wherever there are human beings. What could be an acceptable statement is that Western philosophers, by virtue of their ability to read and write, were able to articulate and broadcast their ideas on human rights. But, like all good and positive values, it was inevitable for human civilisation to claim to have "invented" and originated human rights. But, the attempts by the Western nations to claim human rights as artefacts and products of their civilisation have provided another school of thought on human rights.

The school of thought that challenges the universalist position is called **cultural relativism**. This perspective is promoted mainly by some anthropologists, African

nationalists, Muslims and Asian scholars. These cultural relativists locate human rights in various local histories and local civilisations. For instance, as far back as 1947, during the drafting of the Universal Declaration of Human Rights, Melville Herskovits (a well-known anthropologist) criticised the draft declaration for being informed by an "ethnocentric extension of absolutist Western values" that disrespected other existing cultures and civilisations that were different from those of the Western world. To the cultural relativists, human rights emerged from different histories and civilisations, sometimes even carrying different names and articulations.

Cultural relativists are against human rights packaged as Western values that other parts of the world have to accept while abandoning their own values, which are also human-rights sensitive. Cultural relativists see such an approach as a form of cultural imperialism.

This idea is well expressed by Mahathir Mohamed (cited in Ishay 1997:30), former Prime Minister of Malaysia, who said:

> The term 'universal values' is just a cover for a system that a small international liberal elite wants to impose on the whole world. I am not sure that such a system enjoys majority support, even in the West. Let us take the example you have cited: equal rights for women. In Denmark, for example, the law allows lesbian women, like homosexual men, to get legally married to one another and even adopt children. We cannot allow such a thing. Another example: men may go to prostitutes to satisfy themselves. But should we also allow women to use male prostitutes in the name of equality? In such case, we say: No to universal values! In other cases, we have women in all walks of life in Malaysia, including cabinet ministers and fighter-jet pilots. At the same time, we also say no to the self-styled spokesmen for Islam who wish to exclude women from public life altogether.

Cultural relativists maintain that non-Western people, including Africans, have their own civilisations and cultures that are underpinned by human rights. They also rail against conceptualising human rights as individualised and emphasise the equal importance of collective and communitarian rights. The problem with cultural relativism is that it implies that there are numerous forms of human rights shaped by different histories and cultures. The challenge is how to codify various forms of human rights into international law and global declarations like the Universal Declaration of Human Rights.

The limitations of both universalist and culturalist perspectives gave rise to a third school of thought on human rights. This school of thought is called **materialist**. Its roots are traceable to Marxism and the school of political economy. It emphasises the material basis of human rights and denies that human rights are a natural phenomenon. In a typical Marxist tradition, human rights are articulated as production of human action in the struggle against exploitation and oppression.

The materialists criticised culturalist perspective for oversimplifying, romanticising and essentialising particular cultures, histories and geographies. To them, culturalists are dictators, who use cultural relativism as a justification for various violations of human rights, including denying women human rights. The universalist approach has not escaped criticism for being Western-centric, Christian-centric and imperialist in its attempts to entrench Western hegemony across the world.

Read closely, materialist thinking does not deny the universality of human rights. But their universalism is not informed by naturality/naturalness of rights. What is universal to the materialists are the facts of oppression and exploitation on the one hand and those of struggle and resistance on the other. To materialists, human rights are products of human struggles against various forms of oppression and exploitation rather than of culture or Western philosophies.

The materialist approach is well articulated by Mahmood Mamdani (1991:236), who states:

> Without the experience of sickness, there can be no idea of health. And without the fact of oppression, there can be no practice of resistance and no notion of rights.

As budding scholars and human rights activists, you must know about these three schools of thought. The materialist school is given credence by the fact that up to today, human beings have continued to fight for human rights. The Universal Declaration of Human Rights and the United Nations Charter are not products of nature or culture, but of human struggles against the fascism and Nazism that led to the Second World War (1939–1945). The Freedom Charter of 1955 and the globally celebrated national Constitution of South Africa are not products of culture or nature, but of struggles and sacrifices, which saw Nelson Mandela languishing in prison for 27 years. Women's rights were not given to them by men; they are products of feminist struggles against patriarchy. Having said this, I think we must take seriously this formula:

OPPRESSION/EXPLOITATION = HUMAN STRUGGLES/RESISTANCE = HUMAN RIGHTS

This rendition of human rights calls on human beings never to relax in the face of oppression, injustice and denial of human rights. Only through resistance can oppressive regimes like that of apartheid collapse, opening the way for enjoyment of human rights, democracy and development.

Let us end this section by saying:

ALUTA CONTINUA/THE STRUGGLE CONTINUES FOR HUMAN RIGHTS, JUSTICE AND DEVELOPMENT FOR THE POOR!!

Activity 4.1

Answer the following questions:

1. Where do human rights originate from?
2. What do you understand by the theory of natural rights?
3. Do all human beings enjoy human rights?
4. Outline the core components of the universalist approach to human rights.
5. What do you understand by cultural imperialism?
6. Do you agree with the tenets of cultural relativism?
7. What is the materialist approach to human rights?
8. Explain, in your own words, the meaning of the following:
   a Universal human rights
   b Indivisible human rights

c Inalienable human rights

For additional insights, visit http://blogs.lse.ac.uk/humanrights/2016/09/14/are-human-rights-really-universal-inalienable-and-indivisible/

4.3 FOUR GENERATIONS OF HUMAN RIGHTS

The debate on human rights is not confined to the perspectives outlined above. Once human rights were accepted as universal, another debate emerged. This time the debate is about hierarchisation of rights in terms of generations and which forms of rights are primary among civil and political rights; economic, social and cultural rights; and rights to development.

The United Nations was established in 1945, in the aftermath of the Second World War, to replace the League of Nations. The goal was to promote global peace and security and to foster international cooperation to address economic, social, cultural and humanitarian problems. When the UN adopted the **Universal Declaration of Human Rights** (UDHR) in 1948, civil and political rights were considered primary. Yigen (2000:14) summarises this as follows:

> In 1948, the Universal Declaration on Human Rights (UDHR) was adopted by the General Assembly of the United Nations. This historical document contains a whole series of economic, social and cultural rights: among others, the right to work, to free choice of employment, to just and favourable conditions of work, to protection against unemployment, to social security, an adequate standard of living, education, and free participation in the cultural life of the community.

The adoption of the UDHR was followed by work on an International Covenant on Civil and Political Rights (ICCRP), which aimed to make the rights listed in the declaration legally binding and justiciable. But the drafting encountered delays, because of ideological bickering between the West and the East in the context of the Cold War. The Western powers, with their long history of liberal revolutions, saw civil and human rights as paramount. But the then socialist world, led by the Soviet Union and the Eastern European communist regimes, informed by Marxist-Leninist thought, emphasised social democracy. Economic, social and cultural rights are privileged in a social democracy. This disagreement led to the formulation of two covenants: the ICCPR and the International Covenant on Economic, Social and Cultural Rights (ICESCR).

The bickering between the East and the West delayed the adoption of the two covenants until 1968, 18 years after the declaration was adopted. The debate was then joined by the new African states that were emerging from colonial rule and were troubled by a myriad of problems of economic development, safeguarding political independence and protecting themselves from Western cultural imperialism. Like the socialist bloc, they pushed for recognition of economic, social and cultural rights as being equally important as civil and political rights. But the story of prioritisation and hierarchisation of rights continued as more rights were added on the global menu. So far, classification of human rights has evolved into generations, namely:

- **First-generation rights**: These are civil and political rights such as the right to vote and freedom of assembly.

- **Second-generation rights**: These are economic and social rights such as the right to health, education, employment, and housing. Economic rights include the right to development.
- **Third-generation rights:** These are people's or communities' rights such as the right to self-determination of first nations (for example the Aborigines of Australia).
- **Fourth-generation rights**: These are intergenerational justice or rights of future generations. This generation of rights will include preservation of nature and environment for future generations.

What these four generations indicate is that the human rights discourse is evolving and taking on different issues that bedevil human beings at particular epochs into the centre of the equally evolving human rights architecture. What they also indicate is that the terrain of human rights has not stopped being a theatre of conflict and struggle by different human constituencies such as workers, peasants, women and indigenous peoples. It would seem each historical epoch adds a layer or generation of rights that addresses its particular problems and issues. Indeed, first-generation rights were topical soon after the end of the Second World War. Even those African forces that were fighting against colonialism used the Universal Declaration to justify their struggles and also as a basis to condemn colonialism and apartheid as violations of human rights. Regarding the latter, Gutto (2013:34-35) mentions:

> The serious international crimes and gross violations of human rights perpetrated by European colonialists in Africa include genocide against the Herero and the San by the Germans in Namibia. The other, arguably one of the world's greatest genocides, was carried out by the Belgians in the Congo at the close of the 19th century and the beginning of the 20th century. Close to ten million people were killed and many had their limbs chopped off …
>
> … Many horrendous international war crimes and crimes against humanity were committed by the colonialists during the wars for national liberation in several African countries, especially in Kenya, Algeria, Zimbabwe, Mozambique, Angola, Namibia, South Africa, Guinea Bissau, Cape Verde, and Sao Tome and Principe. In Kenya, in the 1950s up to 1962, for example, civilian children and non-combatant women and men were put in concentration camps, women and girls were raped and thousands were tortured – including captured liberation fighters."

The peoples of the South and the indigenous people's movements are still fighting for full recognition of third- and fourth-generation rights. Questions about the "justifiability" of some of the rights are raised by those who resist recognition of some rights. The struggles have escalated to the extent that different geographical regions such as Asia, Africa, America and Europe have been competing to produce different conventions on human rights. Examples of regional human rights mechanisms include the **European Convention on Human Rights** (see http://www.echr.coe.int/Documents/Convention_ENG.pdf) and the **African Charter on Human and People's Rights (ACHPR).**

The European Convention on Human Rights, formulated by the Council of Europe in November 1950, was an attempt to formulate global human rights following the UN's Universal Declaration of Human Rights in 1948. It was informed by the trauma of the Second World War. The ACHPR (see http://www.achpr.org/about/

history/) came into being in November 1987 in Addis Ababa and its Secretariat is located in Banjul, Gambia.

The ACHPR has the following strengths:

1. It combines civil, political and socio-economic rights.
2. It explicitly prohibits ethnic discrimination.
3. It gives jurisdiction to the African Court on Human and Peoples' Rights.
4. Article 55 of the Charter enables inter-state communication.

Source: Gittleman (1982) and Viljoen (2006)

The ACHPR has the following weaknesses:

1. Some rights are poorly defined, for example the right to work is not defined in terms of the state's duties in this regard, but only references equitable working conditions and equal pay for equal work.
2. There are many claw-back clauses allowing states leeway in terms of domestic laws.
3. Its enforcement is based on negotiation and conciliation instead of an adversarial approach.

Source: Gittleman (1982) and Church, Schulze and Strydom (2007)

Both the European Convention on Human Rights and the ACPHR try to address human rights violations via a judicial system that seeks for local, amicable settlements for problem. However, the African Court of Human and People Rights holds wider jurisdiction. Whereas the European system has no restriction on the number of judges from the same country, the ACPHR demands that no two judges may have the same nationality. The African Court must deliver a judgment within ninety days, whereas no such time limits are required by the European Court (Viljoen 2006).

The **International Criminal Court (ICC)**, founded in 2002, is an intergovernmental organisation and international tribunal situated in The Hague in the Netherlands. The ICC prosecutes genocide, war crimes and human rights violations. The creation of the ICC was regarded by some as a milestone in international criminal justice and in ensuring respect for human rights.

In Reading Box 4.2, some of the crimes that fall under the jurisdiction of the ICC are outlined.

READING BOX 4.2

CORE CRIMES DEFINED IN THE ROME STATUTE OF THE INTERNATIONAL CRIMINAL COURT

What crimes are under the jurisdiction of the International Criminal Court?

The Rome Statute, the founding treaty of the International Criminal Court (ICC), identifies, for the purposes of exercising jurisdiction, the most serious violations of international human rights and humanitarian law. These violations are grouped within the categories of genocide, crimes against humanity, war crimes and the crime of aggression.

How are the crimes under the ICC's jurisdiction defined?

Genocide:

The Rome Statute defines the crime of genocide as any of the following acts committed with intent to destroy, in whole or in part, a national, ethnical, racial or religious group:

- Killing members of the group
- Causing serious bodily or mental harm to members of the group
- Deliberately inflicting on the group conditions of life calculated to bring about its physical destruction in whole or in part
- Imposing measures intended to prevent births within the group
- Forcibly transferring children of the group to another group

Crimes against humanity:

Crimes against humanity are defined as any of the following acts when committed as part of a widespread or systematic attack directed against any civilian population, with knowledge of the attack:

- Murder
- Extermination
- Enslavement
- Deportation or forcible transfer of population
- Imprisonment or other severe deprivation of physical liberty in violation of fundamental rules of international law
- Torture
- Rape, sexual slavery, enforced prostitution, forced pregnancy, enforced sterilisation, or any other form of sexual violence of comparable gravity
- Persecution against any identifiable group or collectivity on political, racial, national, ethnic, cultural, religious, gender, or other grounds that are universally recognised as impermissible under international law
- Enforced disappearance of persons
- The crime of apartheid
- Other inhumane acts of a similar character intentionally causing great suffering, or serious injury to body or to mental or physical health.

War crimes:

Under the Rome Statute, war crimes are any of the following breeches of the Geneva Conventions of 12 August 1949, perpetrated against any persons or property:

- Wilful killing
- Torture or inhuman treatment, including biological experiments
- Wilfully causing great suffering, or serious injury to body or health
- Extensive destruction and appropriation of property, not justified by military necessity and carried out unlawfully and wantonly
- Compelling a prisoner of war or other protected person to serve in the forces of a hostile power
- Wilfully depriving a prisoner of war or other protected person of the rights of fair and regular trial
- Unlawful deportation or transfer or unlawful confinement
- Taking of hostages

Source: http://www.iccnow.org/documents/FS-CICC-CoreCrimesinRS.pdf

Activity 4.2

Answer the following questions:

1. Under what circumstances did the international community establish the United Nations in 1945?
2. What events influenced the adoption of the Universal Declaration of Human Rights (UDHR) in 1948?
3. List the four generations of human rights.
4. Why was the establishment of the International Criminal Court (ICC) a milestone in the protection of human rights?
5. Find two examples each of genocide and war crimes in Africa.
6. Compare and contrast the European Convention on Human Rights and the ACHPR.
7. Identify the strengths and weaknesses of the ACHPR.

4.4 DEVELOPMENT AS A HUMAN RIGHT

The UNDP's Human Development Report of 2000 and the ACHPR recognised development as a human right. The UNDP clearly articulated that human rights are not some form of reward of development, but a critical component of achieving it. It clearly stated that human rights and development both sought to ensure the freedom, well-being and dignity of all humanity. The connection between development and human rights was stated this way: "human development is essential for realizing human rights, and human rights are essential for full human development" (UNDP 2000).

The ACHPR defined the right to development as a "people's right" rather than an individual's right. A right to development speaks to satisfying the needs of a people – not as an act of charity, but as a right. The right to development is one of the so-called new or third-generation rights, which were articulated in the latter part of the 20th century.

Yigen (2000:280-281) explains that the expansion of the ideas of universal human rights into the notion of development as a human right coincides with a realisation of global problems of increasing inequality, protracted poverty, disease, environmental destruction and conflicts. This is despite the fact that the UDHRC has been in effect for almost 7 decades. Organisations such as Human Rights Watch and Oxfam also entered the international arena to challenge socioeconomic injustices. Oxfam, in particular, has embraced the sustainable livelihood framework and has, for example, come up with the Fair Trade strategy "to solve the crisis of high-end specialty coffee overproduction and attain sustainability for small farmers and producer cooperatives through the cooperation of NGOs and corporations" (Yigen 2000:281).

The link between human rights, freedom and justice speaks directly to the right to development. This connection was clearly articulated by Amartya Sen (1999), in his book, "Development as Freedom", in which he defined development as "a process of expanding the real freedom that people enjoy". In addition, the European Commission for Democracy and Human Rights (EIDHR nd) says that:

Human rights and development are inextricably linked. They have the same ultimate objective to improve human well-being and freedom, based on the inherent dignity and equality of all people.

Human rights and development policies and strategies are mutually reinforcing and complementary. Whereas development will focus on social welfare and on economic growth, human rights established a universally accepted legal regime that conceptualises rights in terms of 'duty bearers' and 'rights holders'. This consensual legal framework is continuously expanding and adapted to different political, social and cultural environments.

Activity 4.3

Read the article by Sibonginkosi Mazibuko (2013), entitled "Understanding underdevelopment through the sustainable livelihoods approach". Note how this approach attempts to pay equal attention to people's assets as it does to people and social institutions.

Answer the following questions:

1. Is development a human right? For additional insights, visit the website http://www.un.org/en/events/righttodevelopment/pdf/rtd_at_a_glance.pdf
2. How, according to Mazibuko (2013), can the sustainable livelihoods approach link human rights and development?
3. What are the challenges in implementing sustainable livelihoods as a model for development?
4. Why is the right to development enveloped in controversies?
5. Are there any causal links between development, freedom, justice and rights?

4.5 DEVELOPMENT AND JUSTICE

The linkages between development and justice speak to the imperatives of exploring the relationship between suffering and duty in the world. They also speak to the role of human ethics and pathos in a situation of underdevelopment and injustice, and so the debate assumes a moral dimension. With increasing globalisation, cases of extreme poverty and hunger in one part of the world cannot be totally ignored by those in another part – or those who are affluent. An imperative of humanitarianism puts the onus on affluent societies and individuals to assist in the struggle to eliminate absolute poverty. Scholars like Amartya Sen, in motivating for the elimination of absolute poverty, have harked back to discourses of natural justice by arguing that the choice to uphold justice and challenge injustice should arise from humanity's innate capacity to reason.

Within this context, the challenges of underdevelopment and its most significant human consequences should not be approached as a welfarist issue, emphasising the primacy of assisting the poor and hungry, but should be driven by a relentless pursuit of justice and a rejection of all forms of injustice. What is needed is a "justice" perspective in development.

Social justice is connected with the idea of equalising rights and opportunities. Smith (1999:158) explains:

> Thus, the achievement of social justice at its most general involves equalisation, or progress towards equality as a moral ideal (Smith 1994). How the value of equality and the process of equalisation are understood in practice will depend on the context: on the circumstances of actual societies in their historical and geographical specificity. In South Africa, the focus is likely to be on race, as a structural source of material (dis)advantage to be transcended, given the history of colonialism followed by apartheid and the strongly racialised distribution of poverty.

The struggle against the spread of HIV and AIDS represents a human rights crisis. This is because of the direct link between HIV/AIDS and discrimination against people who are infected with HIV, living with AIDS or presumed to be infected. Stigmatisation and discrimination impair people's right to prevention, testing and treatment (Amnesty International 2006).

Activity 4.4

Read the article by Sibonginkosi Mazibuko (2013), entitled "Understanding underdevelopment through the sustainable livelihoods approach".

Answer the following questions:

1. Summarise the main ideas expressed by Mazibuko (2013) about underdevelopment in South Africa.
2. In your opinion, who has a duty and obligation to fight poverty, injustice and underdevelopment in South Africa?
3. What are the linkages between a justice perspective on development and a rights-based approach to development?
4. Do you agree that the HIV and AIDS problem is a justice issue? What does this imply for development?

4.6 CONCLUSION

This study unit introduced you to one of the crucial issues of the intractable problem of development in the 21st century: development as a human right and development as justice. We identified some of the core challenges faced in defining development as a human right as well as a justice issue. You probably realised that all the concepts, dealt with here, raise controversies in terms of their genesis, different interpretations and implementation. What you should do now is to think about the issues, weighing the advantages and disadvantages of approaching development as a human right and a question of justice, and arrive at your own conclusions about the prospects of ending poverty in the world.

4.7 OUTCOMES CHECKLIST

Question	Can do	Cannot do
(1) Distinguish between the following: (a) First-generation rights (b) Second-generation rights (c) Third-generation rights (d) Fourth-generation rights		
(2) Provide a definition of a rights-based approach to development.		
(3) Analyse the essence of a justice perspective on development.		
(4) What are the advantages of approaching development as a human rights issue?		
(5) Analyse the core distinguishing features of the ACHPR.		
(6) Is the HIV/AIDS problem a justice issue?		
(7) Distinguish between a/an: (a) universalist approach to human rights (b) cultural relativist approach to human rights (c) materialist approach to human rights		
(8) Compare and contrast a rights-based and a justice perspective on development.		

Study Unit 5

WEALTH, POWER AND POVERTY

OUTCOMES

After studying this study unit, you should be able to:

- differentiate between inequality and poverty
- identify the strengths and weaknesses of the measures and indicators of inequality and poverty
- engage in discussion on the causes of inequality and poverty in the developing world

5.1 INTRODUCTION

Why is it that the world's wealth and power are concentrated only in 20% of the earth's surface, while the rest is engulfed in poverty and inequality?

This study unit introduces you to the global issues of wealth, power, poverty and inequality. You will learn about debates on power (political and economic), inequality and what causes poverty at the international level. In other words, you will be introduced to structural poverty and inequalities.

This study unit tries to show that wealth is in the possession of the industrialised countries. It is this wealth that ensures differentiation among communities and nations alike. The differences between the industrialised and non-industrialised countries can be detected by looking at the origins of multinational companies (MNCs) and international governance structures.

The MNCs are largely Western and the governing structures (IMF, World Bank, World Trade Organisation (WTO), etc.) are located in the West. Another feature is the source of income for the majority of the countries' inhabitants. In developing countries, many inhabitants depend on on-farm incomes, whereas in developed countries many depend on off-farm incomes. At the same time, wage differences are huge between the wealthy and poor countries and between urban and rural spaces; in the developing countries in particular. From another angle, wealthy countries have, for example, very clearly secured property rights, while in the rest of the world these rights are largely communal, especially in rural areas (see De Soto 2008). Lack of clearly secured property rights tends to stifle economic development, as inhabitants of those countries cannot make individual decisions about their lives and the lifestyles they wish to pursue. To the extent that wealth, power and poverty are interlinked – sometimes in a negative way – those that are wealthy wield power (economic, political, cultural) and determine policies that, at times, negatively affect others and then cause and/or contribute to conditions of poverty. This scenario may also be observed in international relations, where governments in the developing world are "forced" to implement policies that produce negative effects.

Consider the statement: "inequality is bad for humanity". Would you agree? Addressing the plight of the poor is not the only reason why people would want to reduce inequality. You would know this from your study of human rights in the

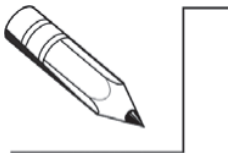
previous study unit. But would the rich and the powerful give up their wealth and power voluntarily? These questions compel us to consider why reducing inequality is important beyond addressing basic needs, compassion and poverty.

Firstly, extreme inequality inside a society implies that those who control wealth have control over the lives of others – for example, in terms of employment, access to housing, education, health care and even over the information they are exposed to. Secondly, the fairness of political institutions is weakened in situations of persistent inequality. In other words, inequality saps the political power of those people at the bottom rungs of society. This is because the voices of the poor can be drowned out by the interests of the rich and the powerful. Thirdly, inequality goes hand-in-hand with unequal access to economic, social and political opportunities. Think here, for example, of people who possess very few assets – can you see that for them to obtain a loan, in order to start a business for instance, would be very difficult indeed?

All three of these problems related to inequality can be addressed (to some extent) through political means – for example, through social welfare and educational policies – without really addressing the root causes of economic inequality. Imagine a situation where the average wage of workers stays the same (or increases slightly), but where the salaries of the top managers increase substantially more. Can you see that this increases economic inequality? Since all who work contributes to the national income, this is a very unfair situation caused by the structural arrangements of society.

Farouky (in Walters 2014) a filmmaker and photographer explains:

> I see inequality as the abuse of power. It's the failure of a society to value its citizens equally, and the success of institutions (governments, corporations, etc.) in keeping some people oppressed and exploited. I don't see equality as equal opportunity; that's not enough.
>
> We can have an academic conversation about how everyone in a society would have the same opportunity to succeed and be safe, if only they applied themselves fully. In practice this isn't true, because the oppressed, the weak and the less powerful have less access to resources and opportunities. In fact, rampant capitalism ensures and entrenches that.
>
> Inequality is one of the roots of injustice, and one of the biggest contributing factors to crime and violence (including war). It's the result of unchecked privilege and of the inability to empathize. It's the ritual humiliation of the less powerful for the benefit of the more powerful. It's depressing and tragic, and the worst part is it's completely unnecessary and totally avoidable, even in a capitalist economy. So, when I see inequality, I see a society that has chosen to keep some of its members subjugated, even though all evidence and observation says that it's destructive and completely preventable.



Activity 5.1

Visit the website http://databank.worldbank.org/data/download/site-content/wdi/maps/2017/world-by-income-wdi-2017.pdf and then answer the following questions:

1. Which regions are the wealthiest in 2017?
2. Which regions have the smallest of global wealth in 2017?
3. Do you agree with Farouky that inequality is bad for humanity? Give reasons for your answer.

5.2 ECONOMIC DEVELOPMENT AND INEQUALITY

Conventional wisdom accepts that inequality is a logical (and probably necessary) consequence of development. Rostow (2000), for instance, in his stages of development, posits that at initial stages economic growth will lead to bottlenecks, but that this should level out in the long term. This view is referred to as the "Economic North", which sees the world from the viewpoint of the West (Aina 2004:1). As Wilson, Kanji and Braathen (2001:4) state, the World Bank still believes in this philosophy and sees economic development and growth as an end in itself instead of the means to social wellbeing. In an attempt to stimulate business and markets, largely to facilitate repayments of loans, the World Bank and the IMF impose structural adjustment policies (SAPs) as conditions for loans and repayment by developing countries. Cutbacks in health, education and other vital social services in the developing world have resulted from these policies.

In addition, developing nations are required to open their economies to compete with each other and with more powerful and established industrialised nations. This has increased poverty and inequality for most people. It also forms the backbone of what we today call globalisation. According to Aina (2004:5), globalisation has resulted in much insecurity, polarisation, pain and inequality as it threatens people's livelihoods and cultures.

Increasingly we see economic growth accompanied by increasing inequalities in people's living conditions. The concept of inequality alone conjures up images of poverty. Indeed, in the developing world inequality and poverty cannot be separated. The question then is: why does economic development produce inequality (and poverty) in the world? It is necessary to understand this before we can begin to think about solutions.

Wilson et al (2001:1) state that inequality and poverty are inextricably and structurally linked with the dimensions of power at all levels. Trying to understand the sources of economic and social stagnation calls for an understanding of the forms of states, the environments they function within and their origins. According to the analysis by Bayart, Ellis and Hibou (1999:221), for example, a state's origins could be attributed to violent military occupation or co-option of dominant local alliances or whether there existed conditions for settler colonialism. These conditions have a huge role in the future direction of states. This explains why we stated very early in this study unit that poverty and inequality are structural issues – they are embedded in the structure of society.

Stated differently, to understand the issues of power relations and inequality is a political issue. Inequality and poverty are a result of socioeconomic policies and practices that were developed in the past. Here, we may wish to consider the roles played by the slave trade, colonialism and globalisation. These historic events have had major impacts on the distribution of world power, wealth, inequality and poverty. Today, the skewed nature of power relations is most observable in international governance structures such as the IMF, the World Bank, the World Trade Organisation (WTO) and the World Economic Forum, as well as regional structures such as the Southern African Development Community (SADC), the North Atlantic Treaty Organization (NATO), the African Unions (AU) and the European Union (EU). For example, the ability of NATO to ignore calls by the AU to avoid military intervention in Africa, such as Libya, is a glaring indication of

inequality and display of all forms of power and wealth used to marginalise the less developed world.

To this end, world inequality and poverty can be delineated at local levels in terms of poor social service delivery, as expressed in housing, health and education, for example; access to income, as represented by low wages and unemployment; and access to resources such as land as well as the glaring differences between rural and urban spaces. For example, because the poor lack adequate land, they struggle not only to grow food, but even to find space to build shelter, as seen in growing informal settlements (squatter camps), and to obtain fuel (wood), which is the basic source of energy for many, especially in rural spaces. Environmental degradation as one major feature of poverty and inequality results from this condition.

The other opposing view regards inequality and poverty as the results of conditions found in very poor countries. These conditions are illiteracy, low economic productivity, economies of affection and so on, as portrayed by, for example, the modernisation theorists (Davids 2009: 4–29).

In this case, to eliminate inequality and poverty, the poor countries need to "clean up their act". In short, this view places the blame for underdevelopment with the poor countries themselves. Whatever the cause, wealth for some and poverty and inequality for others leads to sociopolitical instability. Look at figure 5.1. Can you tell who these people are? What do you think their problem is?

Source: http://mayihlome.wordpress.com

Figure 5.1: Result of poverty and inequality

5.3 GEOGRAPHIES OF INEQUALITY AND POVERTY

Visit the website https://ourworldindata.org/extreme-poverty/ and look at the various descriptions of poverty and inequality. In your view, which part of the world is experiencing falling levels of poverty? You are now probably familiar with the terms "developing" and "developed" world. Do you understand what these terms refer to? Can you name a few developed countries? And developing countries? How did the world come to be dichotomised as developed and developing (or underdeveloped)?

The end of the Second World War led to major changes. One change was that the world was divided into two blocs – the capitalist West and the communist East. The

era, in which the two blocs competed for the control of the world and which led to the present understanding of "development", became known as the Cold War.

The speech by US President Harry Truman in 1947, which became known as the Truman Doctrine, is regarded as the "founding document of Development based on issues of (communist) containment, oil politics and accusations of terrorism and imperialism" (Craig & Porter 2006:46). Since then, the world has become geographically and politically divided into developed (rich) and developing (poor) worlds. Truman considered that the US needed to help struggling countries economically and financially, specifically Greece and Turkey at that time, but also all the free and independent nations. "Free and independent nations" referred to the European countries. Truman's ideas were taken a step further by George Marshall, who extended the "aid" to all of Europe, in what came to be called the Marshall Plan. However, the threat posed by the Soviet Union forced the US in particular to consider assisting other countries, especially those colonised by Europe.

These are the countries that the labels of "developing", "underdeveloped" and "Third World" refer to. These countries had to be assisted to be like the US or Europe through what came to be called development aid (Deb 2009:115; Potter, Binns, Elliott & Smith 1999:21–32).

Deb (2009:15–52) takes the story of development back to much earlier times. He refers to the writings of Hobbes, Spencer, Townsend, Malthus and Darwin (Social Darwinism in particular). Deb (2009) explains how Europe appropriated to herself the role of "civilising" the peoples of other worlds. In that process, that role was in many ways a racist one, as they saw everyone unlike them as inferior, less human and not worthy to live. In accordance with Darwinism's rule of "survival of the fittest", some elements of the human race (as found in Africa, South Asia and Latin America) could just as well be eliminated. On those grounds, slavery and colonialism were justified. Deb (2009) points to writers, such as Marx and Rostow, as thinking that development was a linear or directional process that all nations needed to go through to reach the status of being developed (civilised?). In that way, slavery, colonial plunder and imperialism were justified as missions intended to "civilise" the victims thereof.

Thus, development was born: the US and Europe took the lead, while everyone else had to follow.

In Deb (2009:116) this story is stated as follows:

> America exported its prosperity system and the dynamics of its own history, as the model for others. It preached a doctrine of how to get 'unpoor', aided and invested in the new players who followed the script, and occasionally punished some for their deviation.

Besides the fact that the world has since been divided into "developed" and "developing", the developing world, in particular, is also divided into various blocs. Here you should also keep an eye on the media for issues that touch on regional developments. Frequently, you will hear stories about BRICS (Brazil, Russia, India, China and South Africa), SADC and ECOWAS (Economic Community of West African States). These blocs refer to specific geographic areas and their attempts to achieve "development", which have considerable overlap with the Truman Doctrine.

Activity 5.2

You have decided to use the term "Majority World" rather than "Third World" in your essays in Development Studies. Give five reasons for your decision.

5.4 DEFINING INEQUALITY AND POVERTY

Look up the meanings of the words "inequality" and "poverty" in a dictionary. Do they carry the same meaning? How do they differ in meaning, if at all?

Inequality and poverty may sound the same, but they are not. Inequality may lead to poverty and poverty may lead to inequality; at the same time, while inequality can be tolerated, poverty is intolerable inequality. For example, we can live with a situation where some earn more than others, but we cannot live with a situation where many people do not know where their next meal will come from, people whose human rights are undermined. This condition applies at both national and international level.

5.4.1 Inequality

Inequality can be seen as the social and economic stratification (uneven distribution patterns of incomes, consumption or access to some resources) of society. It is usually said that inequality can be reduced/eliminated by closing income gaps, such as increasing workers' wages. Decreased inequality is also seen as another way to fight poverty, because with better wages people can afford to buy better health, education, transport, recreation, and so forth. With reduced inequality, people are also enabled to participate in the political lives of their countries as citizens.

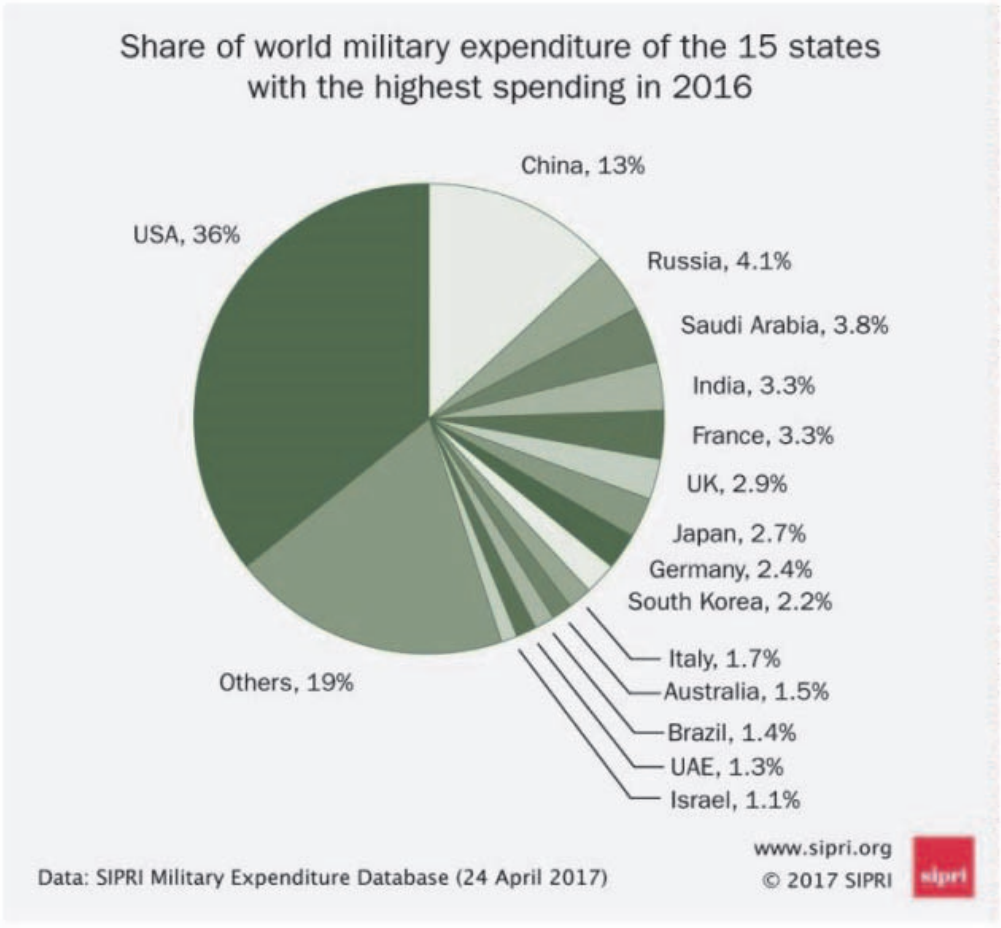
At the international level, inequality is characterised by similar conditions. Those can be seen in what are called development indicators, such as the GDP, GNP, GNI, life expectancies, Gini coefficient (see Reading Box 5.1 in this study unit) and many others. As you will see below, rich countries enjoy better conditions – measured in terms of a variety of indicators. Inequality is measured also in terms of opportunities. The opportunities that exist for countries to trade in the international arena are one example of inequality. If the terms of trade are not evenly (fairly) applied among nations, inequality will show.

This point will be addressed in the following sections. But it could help you if we use a local situation to explain inequality. McKay (2002) gives us the following scenario:

> In 1998, the average consumption levels of the richest 10% of Zambians were 37 times those of the poorest 10%. In India in 1990, 56% of those aged 15 years and above were illiterate, while the 3.6% that had attended tertiary education had received around 16% of the total number of person-years of formal education. In Venezuela in 1996/97, 48.4% of landholdings were of 5 hectares or less, representing in total 1.6% of agricultural land; 2.2% were of 500 hectares or above, collectively accounting for 59.7% of land area.

At the international level, inequality is similar. Take, for example, the 2007 military expenditure and arms transfer shown in figure 5.2. It shows the huge amounts of

money that the wealthy and powerful countries spend on the military compared to the less developed countries.



Source: Stockholm International Peace Research Institute (2016)

Figure 5.2 Military expenditure of fifteen states with the highest expenditures in 2015

Can figure 5.2 be used to explain why the rich countries dominate the international political scene, as reflected in their willingness or unwillingness to be involved or not involved in certain situations? Figure 5.2 also helps explain why NATO is such a powerful organisation. It further tells us that, without military power, nations can do very little at the international level. But again, military power arises as a consequence of economic power. The use and misuse of military power is evident at every level.

This is what Ramonet (2002:2) observes from the increased military expenditure in countries characterised by high and increasing inequality:

> This is a great paradox of our time: we have more people in poverty, but less people in revolt than ever before. Can this continue? Probably not. Because Marxism is exhausted as an international motor of social struggle, the world is in transition. We are in a phase between two cycles of political revolution. Social injustice is more outrageous than ever and, partly as a result of this, other kinds of violence are extreme. In particular, the violence of the poor against the poor, and primitive forms of revolt expressed in illegality, criminality and insecurity. Little by little,

> in one country after another, these moments of violence and revolt are taking on the characteristics of what we could call social war …
>
> ... Faced with this rising tide of what the media calls insecurity, several countries–including Mexico, Colombia, Nigeria and South Africa–now spend more on fighting this social war than on national defence. Brazil spends 2% of GDP on its armed forces and more than 10.6% on protecting the rich against the despair of the poor.
>
> The great lesson of the history of humanity is that in the long term people will always revolt against worsening inequality. The present rise, in North and South, of illegality and criminality, often primitive and archaic manifestations of social agitation, is a clear sign that the world's poorest have had enough of social injustice. It is not yet political violence. But, we all suspect that it might be a lull before a storm. How long will it last?

At the international level, the invasion of smaller states by stronger ones, even if it is against the will of other countries, is carried out regardless. The invasions by the US and Britain of Afghanistan, Iraq and Libya, among others, are recent examples reflecting power inequalities.

Look at Reading Box 5.1 below.

READING BOX 5.1

GINI COEFFICIENT AT LOCAL LEVEL

Inequality is measured by the Gini coefficient, which can vary between "0" and "1". The closer to 1, the more unequal a society, and the closer to 0 the more equal a society. The Gini coefficient measures the distribution of the national income. In a perfectly equal society 10% of the population will receive 10% of the income; 20% of the population will receive 20% of income and so on. For such a society the Gini coefficient will be zero.

If, say, 10% of society receives 30% of the income, or 20% receives 50% of the income, the distribution is more unequal and the Gini coefficient higher. At 1, being the highest possible score, 1% of the population would receive 100% of the income. The Gini score for South Africa is about 0,631. With Brazil, South Africa has one of the most unequal income distributions in the world.

This overall figure, however, hides a particular fact: namely the Gini is higher among African households than among non-African households (Landman, Bhorat, Van Der Berg & Van Aardt 2003).

Bhorat (2015:2) further explains why inequality is so pronounced in South Africa by saying:

There are myriad reasons, but some of the key factors include skewed initial endowments (or assets that people and households have) post-1994 in the form of, for example, human capital, access to financial capital, and ownership patterns. All of these, and other endowments, served to generate a highly unequal growth trajectory, ensuring that those households with these higher levels of endowments gained from the little economic growth there was.

In addition, we are an economy characterised by a growth path which is both skills-intensive and capital-intensive, thus not generating a sufficient quantum of low-wage jobs – which is key to both reducing unemployment and inequality."

5.4.2 Poverty

During the course of your studies, you will come across a number of explanations (theories) of poverty, ranging from intergenerational theories and structural theories to chronic theories. Notwithstanding these arguments, in this course we take the view that poverty is multi-dimensional. While poverty can be visible – as evidenced by shacks, homelessness, unemployment, casualised labour, poor infrastructure and lack of access to basic services – defining it is not so simple; there are many definitions of poverty. Quigley (2003:43–44) and Wilson, Kanji and Braathen (2001:3), for example, define poverty as lack of economic, social, political and environmental assets; situations where people live lives of indignity, unable to provide for themselves and their families, and with jobs that fail to pay them a living wage. This definition suggests that poverty can be seen through geographic, racial, gender and age dimensions. In South Africa, for example, it is generally recognised that poverty is more pronounced in rural areas (geographic dimension), among black people (racial/demographic dimension), gender (social/demographic dimension) and age (demographic dimension). This condition of poverty and inequality is found more or less globally, particularly in the developing world.

Poverty can also be explained using the concepts of absolute (extreme) poverty, moderate poverty and relative poverty. Here we only wish to show you that poverty can be seen in terms of degrees of severity (Landman et al 2003):

- ***Absolute poverty*** implies that households are unable to meet the basic needs for survival. They are chronically hungry, unable to access health care, lack the amenities of safe drinking water and sanitation, cannot afford education for some or all children, and perhaps lack rudimentary shelter and basic articles of clothing like shoes.
- ***Moderate poverty*** refers to conditions of life in which basic needs are met, but just barely.
- ***Relative poverty*** is generally perceived to be a household income level below a given proportion of average national income. A person lacks the necessary resources to enable them to participate in the normal and desirable patterns of life that exist within a given society at a given time.

It has become common to use the US dollar as a measure of poverty. If a person lives on less than $1 a day, they are considered poor (income poverty). According to Landman et al. (2003), this measure hides a lot of inequalities. This situation would also mean that if, for example, the South African rand rises in value, poverty decreases. This is not how things work and, therefore, the $1-a-day standard does

not give us a good picture of poverty and inequality at local (national) levels. Each country rather has its own way of measuring poverty (a poverty line according to which it determines who is poor and who is not). In South Africa, for example, the poverty line is determined using the state old-age pension. To be considered poor in South Africa, a single household must have an income of less than three old-age pensions at any given period. Such people would qualify for various forms of state social security grants.

READING BOX 5.2

DIFFERENCES BETWEEN POVERTY AND INEQUALITY

- Firstly, even a society with a low level of poverty may still be a society with a high level of inequality. The United States clearly has a lower level of poverty than Tanzania, but it also has inequality.
- Secondly, a fairly equal society may still have a high level of poverty. Many developing countries would have a lower Gini coefficient than South Africa, thus a lower level of inequality, but poverty is much worse … Judging by the way that people vote with their feet, inequality with less poverty is more attractive than equality in poverty.
- Thirdly, a society in economic take-off will, whilst in the transition from poor to less poor, experience rising inequality. This is as inevitable as the night following the day. Whilst progress is being made with poverty reduction, inequality may be worsening.
- Fourthly, the goal of transforming the ownership and composition of the economy to reflect the country's demographics more accurately will inevitably entail a worsening of the Gini coefficient …
- Fifthly, poverty and inequality will respond differently to growth. High growth will certainly help to roll back the one (poverty), but it might exacerbate the other (inequality). This confronts policy makers with a brutal choice: which one gets the priority? … Under rampant growth philosophies, combating poverty is the priority. The best example of that would be present-day China, Korea, Taiwan and Malaysia (Landman et al 2003).

5.5 MEASURING INEQUALITY AND POVERTY

Inequality and poverty are measured in many ways including incomes, consumption, literacy levels, land holdings and life expectancy. The measure that is used depends on the purpose of the study. As a way of introducing you to these measures, we will use gross GDP per capita, adult literacy and life expectancy as measures of inequality among nations or states.

GDP is defined as the sum of all goods and services produced in a country over time, without double-counting products used in other output. It is a comprehensive measure, covering the production of consumer goods and services, even government services, and investment goods. Through this single measure, it can be determined whether the economy is expanding or contracting. GDP is an economic concept. Here, you are not necessarily required to know how GDP is derived, but it would be to our advantage if you have some background in economics.

You will notice that development indicators have their own shortcomings. GDP per capita, for example, does not:

- indicate whether a country is dependent on one industry (skills, location, fluctuations) or not
- include informal economy and unpaid work, e.g., subsistence farming, bartering
- tell us about the rural economy and ineffective governance
- include remittances from migrant workers (people working outside the borders of their own countries)
- record the negative externalities of economic growth like pollution and environmental damage – the social costs of production
- tell us how the wealth is distributed, or who spends it and what it is spent on

The HDI, which was developed by Amartya Sen and Mahbud ul Had in 1990, combines three indicators: life expectancy, which measures a person's number of years from birth; adult literacy (ability to read and write), which is critical for promoting and communicating development issues including political participation in the country concerned; and GDP. Although HDI reflects societal wellbeing better than most other indicators, it does not reflect environmental degradation or inequalities within countries, and between sexes, and depends on data (e.g. on life expectancy, literacy and education), which are not always available, particularly in low-income countries. HDI is also redundant as a development indicator as it uses data in already-existing indicators.

We hope you realise that the development indicators we refer to here are not without limitations. As pointed out earlier, the use of each indicator depends on why it is used, who uses it, how they use it and probably when they use it. However, as you should be aware by now, the fact that indicators have shortcomings does not mean that they have no value. We only say that these indicators need to be used with circumspection.

READING BOX 5.3

WHAT ARE GDP, EXPORTS AND IMPORTS?

Gross Domestic Product per capita (GDP per capita) is GDP divided by midyear population.

Life expectancy is the number of years a newborn infant would live if prevailing patterns of mortality, at the time of its birth, were to stay the same throughout its life.

Adult literacy rate is the percentage of adults, aged 15 and older, who can, with understanding, read and write a short, simple statement about their everyday life.

Exports and **imports** of goods and services are the value of all goods and other market services provided to or received from the rest of the world.

They include the value of merchandise, freight, insurance, transport, travel, royalties, license fees and other services (communication, construction, financial, information, business, personal, government services and so on).

Source: World Bank (2009)

Table 5.2: Inequality measured in terms of under-five child mortality rates

Region	U5MR (per thousand live births)			Per cent share of global U5MR	
	1990	2005	2015	1990	2015
Developed regions	223	111	80	1,7%	1,3%
Developing regions	12 526	6 189	5 865	98,3%	98,7%
World	12 749	8 299	5 945	100,0%	100,0%

Source: UNICEF (2015:6).

Table 5.2 shows that the high-income countries had the lowest death rate of children under the age of five during this period. This measure says a lot about the inequalities among countries in terms of their state of health, state of nutrition, conditions of women and access to clean piped water, for example. As far as health conditions are concerned, many deaths among children are attributable to common preventable diseases such as diarrhoea, malaria and AIDS.

The fact that these diseases can be prevented, and yet are major killers of children, is an indication that the countries concerned are poor. Keep an eye on local media, which publishes, for example, statistics on HIV/AIDS. You will realise that this disease plays a tremendous role in reinforcing the conditions of inequality and poverty.

READING BOX 5.4

WHAT ARE LIFE EXPECTANCY AND MORTALITY RATES?

Life expectancy at birth is the number of years a new-born infant would live if prevailing patterns of mortality at the time of its birth were to stay the same throughout its life.

Infant mortality rate is the number of infants dying before reaching one year of age, per 1 000 live births, in a given year.

Under-five mortality rate is the probability per 1 000 that a new-born baby will die before reaching age 5, if subject to current age-specific mortality rates.

Child mortality rate is the probability per 1 000 of dying between ages 1 and 5 – that is, the probability of a 1-year-old dying before reaching age 5 – if subject to current age-specific mortality rates.

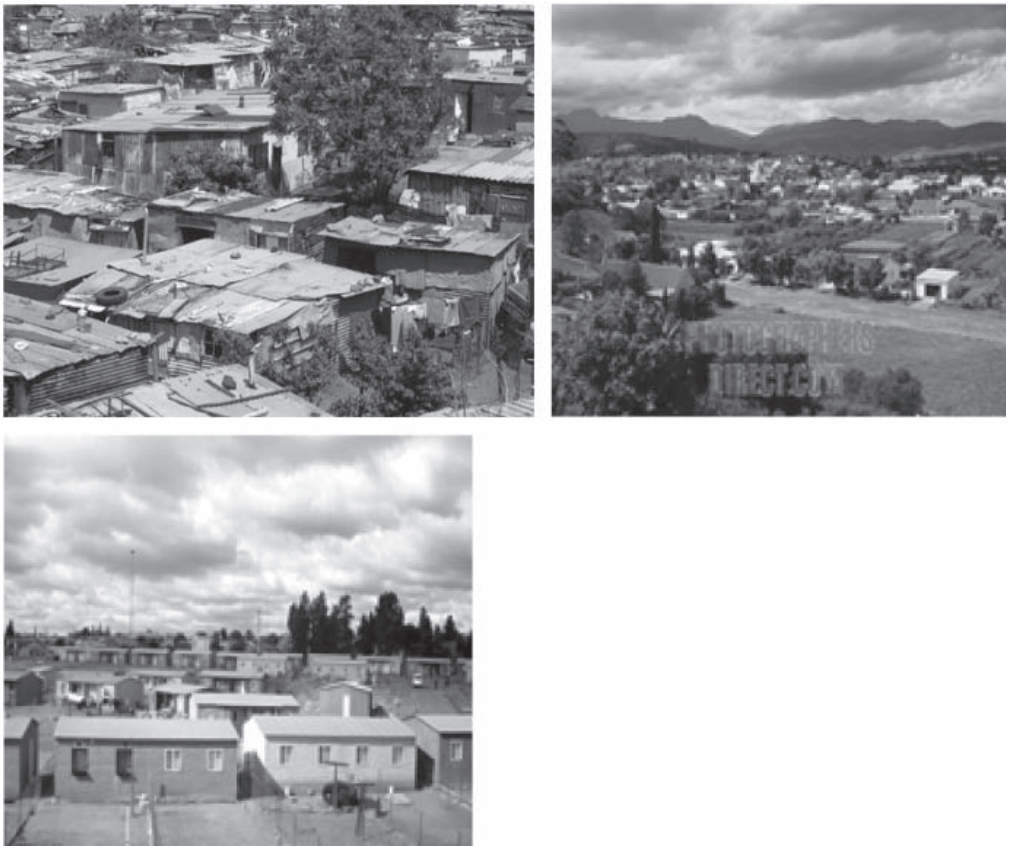
Adult mortality rate is the probability per 1 000 of dying between the ages of 15 and 60 – that is, the probability of a 15-year-old dying before reaching age 60 – if subject to current age-specific mortality rates between those ages (World Bank 2009).

Table 5.3: Inequality measured in terms of life expectancy in 2015

Country	Male	Female
Low income	61	649
Middle income	68	72
High income	76	82

Source: UNFPA (2015)

In table 5.3, we see that the rich countries have populations that live longer than those in poor countries. Once again, many factors of poverty and inequality are responsible for this condition.



Source: www.bing.com/images/soweto

Figure 5.3: Housing as a symbol of inequality

Activity 5.3

Poverty and inequality may be difficult to define, but are probably much easier to identify or see. Look at the photos in figure 5.3.

1. How would you apply the development indicators to each of the three photos?
2. Which photo would you associate with low infant mortality rate and why?
3. Which photo would you associate with low levels of literacy and why?

5.6 CAUSES OF POVERTY AND INEQUALITY

We indicated in the first paragraph of this study unit that you would be introduced to debates on inequality and poverty. By these we simply mean that there are many world views – both genealogical and epistemological – that account for world inequality and poverty. At this stage, we do not expect you to understand them all, but we do expect you to form your own opinions around these issues, remembering that the causes can be attributed to either external or internal factors (or both) in almost all developing countries.

READING BOX 5.5

TERMINOLOGY

Epistemology: *the study of the origin, nature, methods, validity, and limits of human knowledge*

Genealogy: *the study of the evolutionary development of processes*

5.6.1 Structural adjustment programmes, aid and debt

How do we account for the fact that 80% of the world owes the 20% fraction of the world so much that the condition causes massive poverty and inequality in the 80%? Moyo (2009:10–28) outlines the origins of contemporary development aid which finally led to the SAPs. Moyo (2009) traces aid from a meeting at the Mount Washington Hotel in Bretton Woods, US, in 1944. There, it was agreed to establish the World Bank, the IMF and the International Trade Organisation (known as "Bretton Wood institutions"). The aim was to ensure economic, social and political stability, particularly in European countries after the Second World War, and to contain the spread of "communism" against the Soviet Union.

When Europe was seen to have recovered from war "illnesses", attention was turned to other parts of the world. Aid, therefore, played a huge role in the Cold War between the West and the East, and the developing world was caught in-between. We dealt with some of these issues earlier when we referred to the Truman Doctrine and the Marshall Plan. The World Bank and the IMF were created to achieve those aims and objectives that the leaders of the US and Europe stood for.

It was only in the 1980s that the developing countries acknowledged their inability to repay the loans that were provided by the World Bank and the IMF. Because these countries were no longer able to repay, but still required help, it became necessary for the World Bank and the IMF to put in place measures to ensure that they would be able to get their money back. This led to conditional development, as expressed in the SAPs (Dreher & Vaubel 2004:32). The SAPs have contributed to (or even created) conditions of inequality and poverty.

The greatest single influence of foreign aid organisations is exercised through structural adjustment programmes (SAPs). SAPs are linked are the World Bank and the International Monetary Fund (IMF) as ways to restructure the economies of lower income countries and to organise repayments of loans for development. All IMF loans are subject to conditions that the borrowing countries must adhere to. These conditions are specific economic policies, also known as "IMF conditionalities" (Naqvi 2014:203). SAPs meant that large amounts of money were lent by multilateral and bilateral organisations to poor countries in the 1970s.

Despite a proliferation of development projects and programmes related to the SAPs, there was very little actual economic growth. Apart from the unrealistic targets that were set, particularly with regard to the "trickling down" of the benefits of economic growth to the poorer sections of the population, the global oil price crises and climate change militated against rapid economic growth. The poor countries were therefore not in a position to repay either the loans or the interest on the loans and their debt burdens increased.

The SAPs set preconditions for receiving aid or loans, such as:

- prescribing curtailment of public spending, particularly social welfare spending
- balancing public spending with income from taxation
- relaxing price control and restrictions on foreign policy
- deregulating the economy, removing regulations and standards for foreign investment
- flexibility in the labour market
- privatisation and liberalisation of the economy
- reducing protection of domestic industries
- revising agricultural and energy prices
- increasing the efficiency of state enterprises
- increasing support for agriculture and industry

Following protests against punitive SAPs in different countries, some reforms for IMF loan repayments were suggested. Also, the IMF replaced the SAPs with Poverty Reduction Strategy Papers (PRSPs). These were simply repackaged SAPs and, therefore, still unable to lead to actual poverty reduction.

5.6.2 Globalisation (including slavery and colonialism)

To what extent can we argue that conditions of slavery, colonialism and globalisation have caused all the inequality and poverty that pervade the developing world? What accounts for the fact that only 20% of the entire world dominates 80% of the whole world? These "Great Discoveries" for Europe marked the beginning of a "great disaster", as Adam Smith put it, for those who came under the hegemony of Europe (Magubane 2007:227).

According to Magubane (2007:227–244), the European slave trade and economic expansion (colonialism) – which were called "civilisation" – increased suffering, even with the Pope's blessing. Slavery not only robbed countries of their human capital, it led to the view that black people were inferior to white people and therefore their slavery and all other forms of maltreatment were justified. In the light of this, slavery and colonialism were not mere economic epochs; they represent political times during which the seeds of inequality and poverty were planted among nations. Would you agree with the notion that inequality and poverty are political concepts requiring political solutions?

Inequality and poverty are also traced through Marxist schools of thought. Marxists look for explanations in the structure of the society in question, in the economic arrangements present and in the functions that poverty performs for capitalism and the capitalist class. To put it simply: the reason for poverty and inequality lies in the market-based capitalist economy and the fluctuations that all such economies periodically go through. Marxists explain that capitalists will not want to pay adequate wages, because they wish to keep the working-class poor (Alcock 1993:28). It is for this reason that workers' organisations worldwide demand a living wage. The exploitation of local labour by big business is closely connected to what we have just explained above, slavery and colonialism which took place at supranational levels.

Some writers argue that what is termed "globalisation", is nothing new, but a continuum of earlier forms of the North expanding into other lands. They argue that the difference today lies in the ability of transnational corporations (TNCs)

or multinational corporations (MNCs) to trade and influence governments' design policies that favour them (the TNCs) in the developing world. Those could be policies on prices, tax or labour wages. Transnational corporations are found in all countries. Examples are McDonalds, Coca-Cola, Shell, Microsoft and many others that trade across their own national borders, amassing profits while local people starve. They own technology, patents and intellectual rights. You may wish to think, for example, about the debate on manufacturing the ARVs which are used to minimise the impacts of HIV/AIDS. The TNCs refused to grant those rights to the neediest parts of the world.

READING BOX 5.6

WHAT IS A LIVING WAGE?

Living wage is a term variably used to describe a minimum wage sufficient to cover a specific quality and quantity of housing, food, utilities, transport, health care and recreation. The concept differs from that of a minimum wage in that the minimum wage, whilst legislated, may not be sufficient to meet the requirements of a living wage (COSATU 2011).

5.6.3 Aid

While there is no doubt that development aid does provide relief to many in the developing world, there is growing dissatisfaction with how that aid is provided. Critics of aid point out that there is no evidence of a country ever outgrowing aid. In this sense, aid is seen as creating dependency on the rich world. The political nature of aid ensures that the poor stay poor, as the debt is never paid off. Worse still, donor countries tend to dictate to recipient countries how they should run their economies. In many instances, the prescribed policies have simply increased suffering while donors continue to benefit from the loans.

Reading Box 5.7 portrays a situation typical of foreign donors in many countries.

READING BOX 5.7

THE ERADICATION OF THE CREOLE PIG: AID – IN WHOSE INTERESTS?

Haiti used to have one million pigs, which served as an important source (50%) of the annual protein consumption and, in the absence of a "banking system", a vital savings capacity for peasant families. Between 1981 and 1983, under the pretence of African swine fever spreading in Haiti (and to the USA), the USA provided funds to eradicate all creole pigs in Haiti. The USA then donated its own replacement gemelle pigs to farmers. Gemelle pigs require a concrete sty, special diet and are not well suited to the scavenging, free grazing custom in rural Haiti. The policy had devastating effects on peasant families (many of whom still remember the exact date their pigs were destroyed). Donors are now supporting the restocking of creole pigs. This is a famous episode, but worth repeating as a poignant analogy for the development cooperation relationship as a whole. It begs the question of whose interests are really at heart. Should aid be continued if it means that the donor subsidises its own producers, imposes inappropriate programmes without consultation with recipients and ends up destroying local livelihoods?

Source: Reality Aid Project (1997:214).

5.6.4 Terms of trade and trade barriers

Why is it that the developing world produces 80% of the world's wealth, but is still the least developed?

The developing world has been used as sources of wealth for the nations of the North. While the South produces raw materials, the North manufactures products that are also destined for consumption by the South. It is the North that possesses technology and patent rights, to the disadvantage of the South. The South also has little say in determining the prices of the goods they trade. Products from the North are cheaper than local produce, because of subsidies. Through the SAPs, the South is prohibited from subsidising its products. This means that local products can be more expensive than imported products. As consumers turn to buying imported products, local industries and local employment opportunities can be negatively affected.

Aid can be in the form of loans to governments to boost their development. Loans to African governments increased from 9,9 billion US dollars in 2006 to 23,4 billion US dollars in 2012. This boom in loans was due to private banks and other financial institutions in Japan, China, Germany and France borrowing money at low rates in Europe and the United States, lending this to African governments and then making large profits on interests. The debt burden on the loan recipients, and the further consequences of this, will only become clear in years to come. The main point is that a lot of money that could be put to better use are taken up in expensive debt repayments (Health Poverty Action, Jubilee Debt Campaign, World Development Movement, African Forum and Network on Debt and Development, Friends of the Earth Africa, Tax Justice Network, People's Health Movement Kenya, Zimbabwe and UK, War on Want, Community Working Group on Health Zimbabwe, Medact, Healthworkers4All Coalition, groundWork, Friends of the Earth South Africa, and JA!Justica Ambiental/Friends of the Earth Mozambique 2014:9).

READING BOX 5.8

THE MEANING OF TRADE

What is trade?

Trade is what we call it when people buy and sell things. A producer might sell items or provide a service, and a customer pays them for it. This is trade … The problem with international trade is that richer countries don't play by fair rules. Richer countries often put a high tax on items that they buy from poorer countries, which makes these items more expensive for people to buy. This means that poorer countries don't earn as much for their goods as they could. Also, richer countries sometimes cheat by giving their own producers extra money (subsidies) to help them make a profit. This is unfair to the producers in poorer countries, because their products are taxed and they don't get the same amount of help. It's really difficult for them to make a living.

Why is it important to make trade fair?

If we want to make it fair, we need richer countries to stop charging taxes on the products from poorer countries. We also need them to scrap the extra money they give to their own producers. That way, everybody will have the same chance of making a living.

What can I do to help?

Have you ever seen the Fairtrade mark on items in the shops? If you buy products with this mark on, you're making sure that the producer is paid a fair price for their goods

Source: www.oxfam.org.uk

Health Poverty Action et al. (2014:11) explain:

> Since the 1980s, international financial institutions, dominated by the US and EU countries, have forced African countries, through structural adjustment programmes, to become increasingly export oriented and open their markets to foreign trade and investment. Their growth has depended heavily on skewed investment arrangements, loans and debt financing. The result has been high indebtedness and higher financial outflows, described as a 'revolving door' of borrowing, debt repayment and capital flight …
>
> …This has opened the door for foreign investment, often multinational companies (MNCs) involved in complex chains of investment through a range of jurisdictions. Foreign direct investment (FDI) takes two forms, 'greenfield' relating to investment that establishes new production facilities, such as a company that sets up a new factory, or 'brownfield' cross border mergers and acquisitions, the takeover of existing businesses. The latter does not create new infrastructure and technology, but it rather shifts the ownership out of African hands, to foreign investors. Between September 2011 and March 2012, 236 merger and acquisition deals were reported in Africa, with energy and mining dominating. Some argue that the benefits of 'greenfield' investment include transfer of technology, employment and training opportunities, and taxation revenue. Yet, MNCs can dominate the local credit market, hold a monopolistic position and use tax incentives, pushing local firms out of business, especially in the absence of proper regulation.

Activity 5.4

Watch the brief video at https://www.youtube.com/watch?v=E5hdcfFyahM

Read the article entitled: "Developing Africa: Trade barriers, liberalization and inequality in the World Trade Organisation", by K Reddy (2011).

Identify specific parts (such as subsidies, trade barriers, loan interests) of the SAPs that could be said to cause or contributing to inequality and poverty in the developing world. Describe how each of these works.

5.6.5 Socioeconomic instability

Poverty and inequality have also been blamed on conditions of political instability, social strife and poor governance in the developing countries. According to Green (2008:274), violent crimes and political instabilities are common in many states characterised by poverty and inequality. He gives examples such as the US, where the murder rate was 5.7 per 100 000 people, compared to sub-Saharan Africa and the Caribbean, where the rates were 17–20 per 100 000 and 25 per 100 000, respectively, in 2006. Conventional wisdom holds that potential economic investors are also unlikely to take their capital into situations that pose economic risks. The message here is that in situations of "conflict" economic performance is also poor, exacerbating poverty and inequality.

5.6.6 Educational inequality

Education represents the formation of human capital as people obtain skills and knowledge. Advocates of this thinking argue that especially lack of basic education is associated with poor economic performance. Some authors even point out that countries such as India, South Korea, Ireland, Taiwan and China have managed to reach their current economic performance as a result of improved universal education, particularly among women.

On the other hand, when skilled personnel leave their countries, we have a situation called "the brain drain". Health Poverty Action et al. (2014:21-22) note that the "brain drain" from Africa is almost double that of the average for the world. This means that the destination countries benefit from the professional training invested in health care workers, educators and so on. Moreover, some countries have unethical recruitment drives to get these professionals to come and work for them. This is especially the case with health care professionals. They (Health Poverty Action et al. 2014:22) comment:

> Due to a lack of university teachers, in 2000, Nigeria, one of Africa's wealthier countries, could only accept 12% of applicants to its universities, highlighting a vicious circle in which a dearth of teachers hinders the development of new generations of skilled workers. African governments suffer a further financial loss in employing experts from countries in the global North to fill their own skills gaps.

5.6.7 Wealth inequality

Although we have mentioned a number of factors that cause poverty and inequality, the distribution of wealth among nations is fundamental to these issues. Nations

use their wealth (economic power) to build their power (military power). Both these forms of power are subtly used also to "compel" nations to vote in particular ways, particularly at the United Nations and other international governing bodies. Developing countries can always be seen voting with powerful nations, even if the issue they vote for could be a disadvantage for them. However, because they fear that the powerful may retaliate – economically in many cases – the poor countries also hardly honour the agreements they reach at their own regional-level organisations. This kind of inequality is perhaps the most dangerous. It sets the pace and trends within developing states.

Activity 5.5

List seven causes of inequality and poverty in the developing world and explain the extent to which these causes emanate from both within and outside these countries.

5.7 CONCLUSION

In this study unit, we covered issues relating to power, wealth and poverty and inequality. Among other things, we explained that wealth, power and poverty are conditioned more than anything by both historical and political factors. We explained how these issues have led to inequality, which, in turn, reinforces poverty. You should be able to understand the various indicators and measures of both poverty and inequality. But more than anything, you should be able to demonstrate the outcomes set out for this study unit and the module as a whole.

5.8 OUTCOMES CHECKLIST

Question	Can do	Cannot do
(1) What is the difference between poverty and inequality?		
(2) In your view, what causes poverty?		
(3) In your view, what causes inequality?		
(4) Which development indicator do you think best explains the conditions of poverty and inequality? Give reasons.		

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