undercurrent

The Canadian Undergraduate Journal of Development Studies
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An undercurrent, by definition, is the unseen movement of water beneath the surface; its tug and motion are only perceptible upon submersion. It is an apt metaphor both for international development studies and its undergraduates. The intriguing tensions and debates within the field of IDS flow beneath a popularized veneer of humanitarian charity. And we, its undergraduates, study at the margins of the arena of the academy – much of our vitality and dynamism hidden from view. Undercurrent is a publication that immerses its readers in the ebbs and flows of development studies through the perspective of Canadian undergraduates.

Indelibly marked by the legacy of colonialism and the onward march of global integration, international development studies is a field illuminated by our confrontation with human difference and inequality. The just pursuit of unity in diversity promises to be a reiterating challenge for the next century, and water is a fitting icon for such a pursuit: an elemental reminder of our fundamental oneness that, through its definition of our planetary geography, also preserves our distance.

With aspirations of distinction, we are proud to offer Undercurrent.

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Un undercurrent (courant de fond), par définition, est le mouvement invisible de l'eau sous la surface. Son va-et-vient est seulement apparent par submersion. Ceci est une métaphore à propos des études de développement international et des étudiants au baccalauréat. Les tensions et les débats fascinants au sein du domaine du développement international circulent sous l'aspect superficiel de la charité. De manière comparable, nous qui étudions aux marges du champ académique voyons que notre vitalité et notre dynamisme sont souvent masqués aux regards d'autrui. Undercurrent est une publication qui immerge ses lecteurs dans le flux et le reflux des études de développement international à travers la perspective d'étudiants canadiens.

Indélébilement marquées par l'héritage du colonialisme et de l'intégration mondiale actuelle, les études de développement international sont un champ éclairé par notre confrontation avec la différence humaine et l'inégalité. La poursuite judicieuse d'une unité au sein de la diversité promet d'être un défi récurrent pour le siècle à venir. L'eau est une image appropriée pour une telle quête : elle est un rappel élémentaire de notre unité fondamentale, qui, parce qu'elle définit notre géographie planétaire, préserve aussi notre distance.

Avec des ambitions de distinction, nous sommes fiers de présenter Undercurrent.

About
Undercurrent is the only student-run national undergraduate journal publishing scholarly essays and articles that explore the subject of international development.
While individual authors may present distinct, critical viewpoints, Undercurrent does not harbour any particular ideological commitments. Instead, the journal aims to evince the broad range of applications for development theory and methodology and to promote interdisciplinary discourse by publishing an array of articulate, well-researched pieces.
Undercurrent endeavours to raise the profile of undergraduate IDS; to establish a venue for young scholars to undergo constructive review and have work published; to provide the best examples of work currently being done in undergraduate IDS programmes in Canada; and to stimlate creative scholarship, dialogue and debate about the theory and practice of development.

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Letter from the Editor

On behalf of the Editorial Board and staff of Undercurrent, I am delighted to welcome you to the 2007 Double Issue. Although it took a while to get to this point, we are proud to showcase these chosen articles and authors.

We received an overwhelming number of fantastic submissions on a wide range of topics, and it was extremely difficult to decide which ones should go into this issue. While we appreciate each and every author's submission, we felt that these selections demonstrate the diversity of foci, debates and approaches to many of the key and current issues in development studies. The authors of each of the selected works should be commended for their tireless efforts spent researching, writing and revising their manuscripts; likewise, I would like to express my utmost gratitude to this year's dedicated Editorial Board and staff, particularly for their perseverance and willingness to review and revise manuscripts despite their other pressing commitments.

One of the themes that seemed to surface in several of the articles in this issue was the importance of looking at gender in Development processes. Moving beyond historical constructions of simply isolating (an often universalized definition of) 'women in development,' the rise of Gender and Development (GAD) studies has led to an increased appreciation for the distinct and contextualized ways that women negotiate and seek out their own needs and demands in vastly different and ever-changing global situations. While still a relatively new area of development studies, this emphasis has led to a greater consciousness of men's participation in changing societal inequalities, as well as how women's well-being is intimately connected to larger (inter)national and historical processes and contexts. Through the gender-centred papers in this issue, we take you from the streets of Toronto to the markets of Accra; we read about women's struggles to meet their (gendered) needs through an under- and unemployed worker's movement in Argentina and, separately, through collaboration with civil society organizations in Liberia.

The remaining papers in this issue offer valuable insights into how undergraduates are engaging with issues of social justice, environmental consciousness, food security and development practice in our globalized, post-9/11 world. Ranging from an evaluative case study of a CIDA-funded programme in Sri Lanka to a critique of post-apartheid representations of indigenous cultures in South African 'cultural villages,' these works by young Canadian scholars exemplify the best of development studies by engaging with global processes on the practical as well as the theoretical level.

As Editor-in-Chief, I am honoured to present their work to you in this, our Double Issue.

Best wishes,

Jenn L. Harris
Editor-in-Chief
Undercurrent: The Canadian Undergraduate Journal of Development Studies

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Whatever Happened to Maria: An Exposé on the Relationship Between Filipina Domestic Workers and Their Female Middle-Class Employers in Toronto's Gentrified Neighbourhoods

Katie Palmer

ABSTRACT – This essay explores the linkages between urban renewal, the growth of a professional class of women, and the unprecedented inflow of migrant domestic workers from the Philippines. The mass exodus of women from the Philippines is a consequence of structural inequalities between the Global South and the Global North and a consequence of structural adjustment programs. Through national policies, the Filipino government promotes the emigration of females to work overseas. Building on the scholarly works of Geraldine Pratt (1999), Saskia Sassen (2002), Arlie Hochschild (2002) as well as many other academic thinkers, the author illustrates how both the professional class of women in gentrified neighbourhoods and their hired domestic workers are crucial economic actors to local development projects. Despite the parallels that exist between the importance of these women's contributions to their respective localities, their experiences in the micro setting are acutely distinct. This paper uses Toronto as a case study to illustrate how these contrasting realities materialize in gentrified neighbourhoods.

RÉSUMÉ – Cette rédaction examine les liens entre la rénovation urbaine, la croissance de la classe professionnelle des femmes, et l'afflux sans précédent de travailleuses immigrées domestiques qui viennent des Philippines. L'exode massif des femmes des Philippines est un résultat des inégalités structurelles entre la région du sud et celle du nord et le résultat de programmes d'ajustement structurelles. Le gouvernement encourage l'émigration des femmes de travailler à l'étranger grâce aux politiques nationales. Misant sur les études faites pas Geraldine Pratt (1999), Saskia Sassen (2002), Arlie Hochschild (2002) ainsi que d'autres théoriciens scolaires, l'auteur illustre la manière dont la classe professionnelle des femmes dans des quartiers embourgeoisés aussi que leurs travailleuses domestiques embauchées sont des acteurs économiques essentiels aux projets de développement locaux. Malgré les parallèles qui existent entre l'importance des contributions faites par ces femmes à leurs localités respectives, leurs expériences dans le micro cadre sont vivement distinctes. Cet article utilise Toronto comme étude de cas pour illustrer comment ces réalités opposées se matérialisent dans des quartiers embourgeoisés.

Strolling along the streets of the Annex can be an exhilarating experience for many middle-class Torontonians. The hustle and bustle of urban life promises to make an evening on the town the highlight of one's week. However, behind the glamour of shopping at elite boutiques, visiting world-class museums, and dining at trendy restaurants exist many hidden stories, all of which are worth sharing. Two years ago, my good friend and I were eager to enjoy a quick meal before the start of our six o'clock lecture. We decided on the Swiss Chalet at Bloor and Bedford – indeed, a popular choice among starving students. This is where we met Maria, our energetic, middle-aged Hispanic waitress. Her quirks, such as dancing while bringing us our food, made our meal an experience to remember. Many months later, we wanted to recreate our experience at Swiss Chalet, hoping to reconnect with Maria. To our surprise and disappointment, the building was empty: no waiters/waitresses, no customers, no scents of greasy french fries and quarter chicken meals wafting through the air. The sign on the building announced that developers had bought the land to erect One Bedford at

Bloor, 'the soon-to-be home to scholars, diplomats, curators, and kings.' I looked at my friend as I cried out, "Whatever happened to Maria?"

By no means is this particular narrative an isolated one – the story of Maria represents the life experiences of many immigrant women of colour in Canadian cities. They frequently find themselves on the edge of the socioeconomic boundaries within global cities and are overrepresented in the service sector. The dominant discourse of urban development, which locates gentrification as a municipal priority, cloaks the growing polarization of the women who inhabit these renewed urban spaces. The processes of urban renewal in many downtown areas are accompanied by the growth of a professional class of women, specifically high-income earners. Given the difficulties many professional women experience with balancing home and work responsibilities, the majority of them choose to live within the boundaries of the downtown core in order to mitigate their commute to work (Sassen, 2002).

One of the consequences of this internal migration of professional women and their families to the inner city is the rearrangement of space for immigrant women of colour. While immigrant women of colour working in fast food restaurants are finding themselves unemployed (perhaps like Maria) due to the process of gentrification, a new set of immigrant women of colour are moving into the area, namely to work as domestic workers. These migrant domestic workers are employed by many career-oriented women to help care for the children of the professional class. Therefore, the process of gentrification is a lived experience that imposes contrasting realities on migrant domestic women and their female middle-class employers at the micro level, both within the household and the workplace. Before exploring how the relationship between these different realities materializes in the context of household and work settings, I will provide a brief overview of the most recent and largest migration of foreign-born paid domestic workers.

Transnational Domesticity, the Global Economy, and the Filipina Labour Diaspora

The growth in transnational migration for the purpose of domestic work in recent years can be attributed to at least three major factors: (i) the rise in female employment, (ii) the symbolic status of hiring domestic workers, and (iii) global structural inequalities. The first is linked to the recent feminization of high-status occupations (Stiell and England, 1997). In each consecutive decade since the 1970s, women's presence in the labour market has been increasing at unprecedented rates. For instance, "in 1996, the rate of employment among Canadian women aged 25-54 was 77.2 percent, up from 62.8 percent in 1981" (Cohen, 2000, p. 3). This factor coupled with the shortage of flexible daycare across the country works to create the demand for live-in childcare. In the Annex, for example, the waitlist for childcare services is six times the available vacancies (Toronto Children's Services, 2006), which gives rise to the demand for alternative childcare services such as live-in caregivers.

The demand for nannies is further compounded by the second factor that helps to explain the influx of foreign domestic workers. The capacity to employ live-in caregivers connotes affluence and sophistication across global cities (Rollins, 1985). The status symbol of hiring a live-in domestic worker is mediated by an elitist parental culture, which includes everything from 'high-end' childcare-focused magazines to upper-class parent board members serving on their children's school council. These agents of high-class reproduction locate the nanny as a necessary commodity, and thus fuel the symbolic preference for nannies over alternative daycare services (Anderson, 2002). Moreover, gentrification projects in global cities further heighten the demand for household workers. For instance, Saskia Sassen (2002) argues there is a direct correlation between the growth of high-income residential areas in urban spaces and the demand for the employment of foreign domestic workers. While domestic workers are indeed spread across the Greater Toronto Area, nannies are most visible in gentrified inner city neighbourhoods such as the Annex.

The supply factors that help explain the unprecedented inflow of live-in caregivers are the structural inequalities that exist between the countries of the Global North and those of the Global South. Given that the latest 'wave' of domestic migrant workers is predominantly from the Philippines (Boti, 1993), this Southeast Asian country will be the site of analysis for the remainder of the paper. Abject poverty, few employment opportunities in the formal economy and inadequate social safety/welfare nets characterize the economic landscape of the Philippines. For instance, "at least seventy percent of families live in poverty. By the 1980s, even a schoolteacher (middle-class) could not afford to buy more than two chickens a month and could only purchase low quality rice" (Parrenas, 2001, p. 63). A lack of viable national employment opportunities prompts the majority of poor and middle-class families to use migration as a household economic strategy to bypass local poverty. Not surprisingly, an estimated 7 ¾ million Filipinas work overseas to support family members left behind in their country of origin (Burgess, 2005).

The decision to use migration as a local economic strategy does not occur in a vacuum. Dating back to the early 1970s, the Marcos government regime adopted export-oriented labour policies as a national approach to jumpstart economic development in the Philippines. This was achieved by "providing incentives to lower the cost of emigrating, reducing travel tax, establishing one-stop centers for processing, and removing customs duties for returnees" (Raj-Hashmin, 1994, p. 123). Given the high degree of national poverty and debt in the Philippines, consecutive government regimes continue to support labour export-oriented policies (Cheng, 2006), which have morphed into the feminization of the Filipino labour diaspora.

The significance of the migrant domestic workers' fiscal contributions to the Filipino economy is illustrated by the fact that "87 percent (US $5.9 billion) of the US $6.79 billion remittances in 1999 went to debt servicing" (Stasiulis & Bakan, 2005, p. 58). Additionally, 34 to 54 percent of the Filipino population is supported by the remittances of domestic migrant women (Parrenas, 2002). Therefore, the demand for migrant domestic women in Canada is supplied by the large pool of Filipina women that choose to migrate in hope of upward economic mobility.

Filipina Domestic Workers and Their Living Experiences in Gentrified Residences

As discussed earlier, the process of gentrification stimulates the desire for live-in domestic workers. I want to further narrow the relationship between this process of urban renewal and the lived experiences of migrant domestic women to the micro level - specifically the household. This is a relatively unexplored, but extremely important arena in feminist geography. Before I proceed, it is important to note once again that the relationship between gentrification and Filipina domestic workers cannot be disentangled from the realities of underdevelopment overseas in the Philippines.

Gentrification in urban centres is linked to the reorganization of the household economy. For the majority of families who live in high-income residential areas, the dual income of both adults is necessary. This creates the demand for non-familial labourers to complete household duties, which include both childcare and cleaning services. Many high-income couples fulfill this need by participating in the global transfer of care from the Philippines to countries of the Global North – even more specifically, to global cities. For instance, 11,000 Canadians employ live-in foreign-born domestic workers; these women are overrepresented in large municipalities like Vancouver, Toronto, and Montreal (Stiell & England, 1997). Within these cities, nannies are most visible in gentrified neighbourhoods. Unmistakably, the traditional gender division of household labour, which locates men as the primary breadwinners and women as the primary caregivers, has morphed into the highly racialized (and still gendered) division of household labour in the context of Canada's largest gentrified neighbourhoods. This demonstrates that gentrified residences are sites of contradictory experiences with high-income women being the beneficiaries and domestic workers being co-opted by the gentrification process.

The gentrified household is commonly represented as a privileged space; however, the experiences of many Filipina migrant women demystify this widespread assumption. For instance, experiencing the home as a privileged space very much intersects with the axes of race, immigrant status, and class (Stasiulis & Bakan, 2005). The features of the Live-in Caregiver Program (LCP) illustrate how social location shapes one's living experience within the gentrified residence. The mode of entry into Canada for migrant domestic workers is facilitated by the LCP. The Live-in Caregiver Program is a visa program that was designed and implemented by the federal government in 1992 (Pratt, 1999) to "facilitate the recruitment of thousands of migrant workers to serve as live-in domestics and nannies for Canadian families" (Bakan and Stasiulis, 1997, p. 31). The LCP grants temporary resident status to all successful candidates, and only if the foreign domestic worker fulfills her contractual obligations is she then permitted to apply for permanent resident status (INTERCEDE, 1993; Stasiulis & Bakan, 2005). Many domestic workers are unable to complete their contracts due to high rates of employer-employee abuse (INTERCEDE, 1993).

Federal laws and regulations (such as the LCP) are directed at controlling the living and working experiences of migrant domestic women, and are mediated by the micropolitics of power played out in the employer-employee relationship. For instance, the employers of domestic workers are given the authority to ensure that the contractual obligations are fulfilled, which can result in many abuses. Thus, the LCP fosters the context of many abuses insofar as the program requires that all domestic workers live in their employers' homes (INTERCEDE, 1993; Stasiulis & Bakan, 2005; Boti, 1993). This results in the blurring of the boundaries between the traditional public and private sphere dichotomy, and thus the employer does indeed become the landlord (Stasiulis & Bakan, 2005). This is especially problematic for domestic workers insofar as "the landlord is responsible for determining access not only to private residence but also to permanent residence in the country, and therefore, the regulatory power of the employing family is augmented even further" (Stasiulis & Bakan, 2005, p. 97). Consequently, the LCP handicaps the majority of domestic workers from experiencing

their residences (the gentrified homes) as places of privilege.

Another example of how many gentrified houses are the sites of contradictory experiences stems from the connotation of the home as a family space. However, this notion of the house as a family space is not a familiar concept for an overwhelming percentage of Filipina domestic workers. The majority of these women migrate overseas without their families, and thus, there is a vast geographical divide between where these women work and where their homes are located. First, Filipina domestic workers - often referred to as 'transnational mothers' - help raise and care for the children of their employers. However, the term 'transnational mother' is problematic insofar as these women do not receive the emotional benefits or privileges of mothering their employers' children (Macklin, 1994). Second, the Live-In Caregiver Programme prohibits migrant domestics from sponsoring any family members until they attain permanent resident status. In order to acquire permanent resident status, a caregiver must live in her employer's home for two years within a three-year period (Stasiulis & Bakan, 2005). Nevertheless, both temporary and permanent family reunification between the Filipina domestic workers and their offspring and husbands can be extremely stressful experiences.

One woman writes, "When I saw my children again, I thought, 'Oh children do grow up without their mother.' I left my youngest when she was only five years old. She was already nine when I saw her again, but she still wanted me to carry her" (Hochschild, 2002, p. 21).[1] This particular anecdote raises a significant insight. The stresses associated with transnational domesticity materialize in multiple locations. Not only do domestic migrant women experience the pains of caring for children other than their own but their offspring and husbands are also subject to many socioeconomic hardships. For instance, "compared to their classmates, the children of migrant workers more frequently fell ill; they were more likely to express anger, confusion, and apathy; and they performed particularly poorly in school coupled with rises in delinquency and child suicide" (Hochschild, 2002, p. 22). Underperformance in the education system is problematic insofar as the long-term development of any country, including the Philippines, rests on the capacity of its citizens to gain transferable academic and experiential skills. Additionally, there are numerous reported cases stating that many husbands of overseas migrant women adopt their daughters as temporary surrogate wives (Balita, 2007). Thus, while the outmigration of Filipina women enables (through the inflow of their remittances) their families to participate in residential upgrading in the Philippines (Parrenas, 2001), this does not always translate into the same familial privilege experienced by many Canadian families living in gentrified neighbourhoods.

Filipina Domestic Workers and Their Working Experiences in Gentrified Residences

Gentrified urban spaces provide housing for the growing professional class of women and their families. The majority of these professional women earned accredited degrees from Canadian-recognized universities and work as lawyers, doctors, professors and business executives. Many professional women and their partners are primarily able to pursue careers by employing live-in domestic workers. A significant parallel exists between the professional class of women and the Filipina domestic workers they employ - both groups of women function as important economic actors in terms of the fiscal contributions they make to the economic development of their communities. For instance, while the professional class of women and their families create the demand and supply for the upscaling of inner city areas, the remittances sent to the Philippines by the Filipina domestic workers aid in the development of local businesses (Sassen, 2002). However, the work experiences of these middle-class female employers sharply contrast the work experiences of their Filipina domestic workers. The three core areas that give rise to these contrasting realities include (i) the deskilling of Filipina domestic workers, (ii) the perceived insignificance and invisibility of paid labour in the private sphere, and (iii) the absence of adequate legal protection.

Many scholars characterize the migration of Filipina women from the Philippines to affluent countries like Canada for the purpose of domestic work as the 'Filipino brain drain' phenomenon (Pratt, 1999; Hochschild, 2002; Hondagneu-Sotelo, 2001; Cheng, 2006). For instance, more than 50 per cent of migrant workers from the Philippines have completed some level of postsecondary education (Appelle, 2003). Many Filipina women that migrate overseas find that they experience downward mobility in their host countries. For instance, the majority of Filipina migrant women "worked as teachers, nurses, and administrative workers in their county of origin" (Hochschild, 2002, p. 18). Upon entrance into Canadian cities, Filipina migrant women find their college credentials and life experiences unrecognized and devalued. Bridget Anderson raises insight to the extreme manifestations of the deskilling process that many Filipina domestic workers encounter: "Their work can be

1 Of course, I want to draw attention to the fact that remittances, phone calls, and 'snail mail' are popular forms of contact among domestic migrant women and their offspring and other family members. All these forms of communication help mitigate the geographical separation that exists between them.

singularly degrading: cleaning cats' anuses, flushing employers' toilets, scrubbing the floors with a toothbrush three times a day, or standing by the door in the same position for hours at a time" (2002, p. 107).

This process of deskilling contributes to the perceived insignificance and invisibility of the work Filipina migrant women complete in the private sphere: "Paid domestic work is distinctive not in being the worst job of all but in being regarded as something other than employment" (Hondagneu-Sotelo, 2001, p. 9). Given that many Filipina domestic workers find themselves "squeezed between the public and private spheres" (Macklin, 1994, p. 32), the significance of their labour is downplayed. The phrase 'labour of love' best describes how many of their employers perceive cooking, cleaning, and caring for children to be these women's 'natural' expressions of love for their families (Hondagneu-Sotelo, 2001; Macklin, 1994).[2] This leads to problematic employer-employee relations insofar as many migrant domestic workers are considered to be 'part of the family' by their employers. Being considered part of the family conflicts with many Filipina domestic workers' common desire to be treated like professionals (Cheever, 2002), and translates economically into low wages, inadequate compensation for overtime work, and infrequent payment of wages (Macklin, 1994; Daenzer, 1997).

The social invisibility of domestic work is cemented by the absence of adequate legal protection. The ineffectiveness of provincial laws to protect foreign domestic workers from serious abuses stems from their legal status as temporary residents of Canada (Cohen, 2000; Lan, 2006). Given that these women are not granted permanent resident status, they are operating at the margins of legality, which "makes it extremely difficult for domestic workers to claim the rights they anticipated when they came to Canada" (Pratt, 1999, p. 25). While the federal government regulates the Live-in Caregiver Program, provincial governments regulate the employment conditions of domestic workers. However, provincial government agencies are reluctant to utilize their jurisdictional political powers to protect migrant domestic workers from workplace abuses: "Because the household is considered the paradigmatic realm of the 'private,' the protections normally accorded to employees in the workplace are frequently denied to domestic workers on the grounds that state intervention in the private sphere is inappropriate" (Macklin, 1994, p. 14). The absence of state intervention is compounded by the lack of clarity surrounding the rights and benefits of migrant domestic workers (Pratt, 1999; Appelle 2003; Stasiulis & Bakan, 2005).

For instance, the Ontario labour legislation specifies that overtime work includes any work that is completed over forty-four hours within a given week. Although domestic workers are expected to receive an overtime rate of 1.5 times the hourly rate, the majority do not receive adequate compensation for their average work weeks of seventy to eighty hours (Stasiulis & Bakan, 2005; Boti, 1993; Daenzer, 1997). Many Filipina domestic workers do not make formal complaints to city officials precisely because they are often ignorant of their own legal rights: "Typically, if a domestic worker complains, the employer falsely threatens to have her deported or turn her over to the police. Therefore, many women suffer in silence because they do not know their rights, nor do they have any idea where to seek help" (Zarembka, 2002, p. 147).

The deskilling of migrant domestic women is not only troublesome in their host countries in terms of the abuses they experience by both the government and their employers, but also poses challenges upon their return to the Philippines. The shift from working as teachers and nurses in their country of origin to working as domestic servants in foreign countries means that these women generally have not gained any marketable or transferable skills for their subsequent jobs. While one could argue domestic workers gain time management and interpersonal skills, these benefits are difficult to market, and are often not highly prioritized without further credentials or skills. As such, the feminization of labour export-oriented policies is not proportionately conducive to the long-term development of the Philippines. For instance, the Philippines will not be regarded as a world-class exporter of labour as long as the nation continues to export low-status domestic workers (Rodriguez, 2005), especially since Filipina domestic workers have an international image that "denotes servility, docility, and shame" (Cheng, 2006, p. 23). A representative from the Philippines' government agency, the Gancayo Commission, explains, "Our nation has the embarrassing reputation that we are a country of domestic workers, entertainers, and even prostitutes. It is said that even in a certain dictionary the latest definition of the word 'Filipina' is a housemaid" (Rodriguez, 2005, p.3). This international image of the Philippines as a nation of servants handicaps the national government's goal to achieve world-class status (Macklin, 1998; Rodriguez, 2005). However, this should not to downplay the fact that Filipina domestic workers are crucial economic actors to local development projects. The inflows of their remittances are often spent on domestically provided goods and services (Chami et al., 2003) as well as spent on much-needed basic infrastructure, including transportation and power facilities (Gonzalez, 1998).

2 I want to draw attention to the fact that these concepts of 'women's innate roles' are socially constructed.

Conclusion and Future Agendas

The influx of Filipina domestic workers into large urban centres is a phenomenon connected with global structural inequalities as well as with local and national development strategies. Much academic literature focuses on the living and working experiences that Filipina domestic women contend with throughout their migratory treks across international boundaries (Pratt 1999; Stasiulis & Bakan, 2005; Silvera, 1983; Appelle, 2003; INTERCEDE, 1993). However, no published research specifically discusses the ways in which Filipina domestic workers are shaping gentrified neighbourhoods in the city of Toronto. Given the high concentration of Filipina domestic workers in these neighbourhoods, this is an important research gap worth exploring. In particular, how do their physical, emotional, and cultural identities affect urban development projects, the organization of gentrified households, and the micro-geography of school yards? What spaces do nannies populate in the cities? Are parks and schoolyards becoming the sites of consciousness-raising among Filipina domestic workers? If so, will this modify the socioeconomic experiences of migrant domestic workers in gentrified neighbourhoods such as the Annex? Such questions must be at the forefront of research inquiries in order to gain a thorough understanding of the ways in which Filipina domestic workers are shaping the landscape of Toronto's gentrified neighbourhoods.

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The Importance of the Aid-Rentier Model to Development Studies[1]

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ABTRACT – *States that receive large amounts of external income, rather than taxation income, are less likely to exhibit democratic traits or be democracies. This core insight from rentier theory is as applicable to aid as it is to oil. Foreign aid played a large role in development throughout the 1990s and this is unlikely to change soon. Therefore, it is vital to be aware of the full range of effects that foreign aid can have on recipient states, and to work towards ways of mitigating the potential problems of aid.*

RÉSUMÉ – *Les États qui reçoivent de grandes sommes de revenues externes, plutôt que des revenues d'impôts, n'ont pas de fortes chances de démontrer des traits démocratiques ni d'être des démocraties. Le noyau de cette idée de la théorie Rentier est aussi applicable à l'aide qu'au pétrole. Aide de l'étranger a joué un grand rôle dans le développement tout au long des années 90 et il est peu probable que cela va changer bientôt. Alors il est important d'être au courant de la variété entière des effets qui l'aide de l'étranger puisse avoir sur les états bénéficiaires et il est important de s'arriver à des manières de minimiser les problèmes possibles de cette aide.*

I. INTRODUCTION

The international political economy theory of rentierism, usually applied to oil or mineral wealth, can be applied to foreign aid. While this idea has surfaced in various strains of political economy, it seems to have not penetrated development thought. This is unfortunate, as the aid-rentier model should be of serious concern to development thinkers and practitioners.

The closest that the development community has come to touching on rentierism is in its focus on 'good governance.' While this focus is useful, it is unfortunate that the governance discourse has missed some of the causes of declines in governance. One overlooked relationship is that between aid and governance. While donors often direct or qualify their aid in an attempt to build good governance in the recipient state, there is good reason to believe that the very transfer of aid itself can lead to declines in governance. This assertion grows out of rentier theory, and the development community is remiss if it speaks of governance but does not explicitly address a theory that ties together a state's financing and governance.

The first section of this paper will explain what rentierism is, why it should be studied, and how it relates to development. The second section will develop a model of rentierism abstracted from oil or mineral wealth. Section three will outline how to apply the rentier model to foreign aid. The fourth section reviews a number of articles that test the link between aid and rentierism and will outline areas of further research. A final section will conclude with the implications of the rentier model to foreign aid and development.

1. What is Rentierism?

Rentierism signifies a political and economic disconnect between a state and its citizens. It is brought

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about when a state is rendered fiscally autonomous from its citizens. This can occur when a state is funded by 'unearned' external income (rents) instead of taxation. The core idea of the theory of rentierism is that when states are funded by rents, they demonstrate certain "political pathologies" such as being relatively undemocratic or suffering from weak rule of law (Moore, 2004, p. 308).

The theory of rentierism has its roots in 'fiscal sociology', expounded most clearly by authors such as Joseph Schumpeter. Fiscal sociologists analyzed the shift of European states from demesne states to tax states. Their focus was on the role of finance in driving political change. The state's budget was seen as "the skeleton of the state stripped of all misleading ideologies" (Schumpeter, 1918, p. 100 in Moore, 2001, p. 19). Thus, financial analysis was given privileged status, as it allowed the researcher to see the reality behind political oratory.

2. Can Rentierism be linked to Development?

Rentierism should concern students of development because of its political effects and its potential causes. Rentierism is especially important in developing states, as their political institutions are often in the process of formation and the outcome of this process could be greatly affected by rentierism.

Rentier states have been shown to act in ways that are considered negative for development, from many different perspectives. While rentierism is associated with poor economic development, this paper focuses on the political effects of rentierism, specifically on how it limits democracy and accountability. Rentier states are less accountable and less democratic than states that derive their revenue from taxing their citizens (Moore, 2004). Mick Moore argues that "the greater the dependence of the state on earned income, the more likely are state-society relations to be characterized by accountability, responsiveness and democracy" (1998, p. 85). This political focus is now especially warranted because the development community's emphasis on 'good governance' has opened a space to examine the political repercussions of aid.

The goal of this paper is to broaden the analysis of rentierism, moving away from exclusively seeing natural resource wealth (minerals, oil) as the cause of rentierism, and toward seeing foreign aid as a potential cause of rentierism. If this link can be defended then (some) foreign aid programmes must be re-assessed for both their effectiveness and their repercussions on the political processes in recipient countries.

II. RENTIERISM AND NATURAL RESOURCES

The rentier model, as it applies to oil, will be briefly outlined before applying the model to aid. This will help those unfamiliar with rentierism to understand how and why it works the way it does. This will also help to explain why the model can be applied to foreign aid.

1. How the model applies to oil

The application of rentierism to oil states is straightforward. The state monopolizes an important area of oil production and generates substantial revenue from selling oil (or access to oil) to foreign actors. This revenue is considered 'unearned' because "the state is resourced with little organizational or political effort on the part of the state apparatus, and especially little such effort in relation to their domestic populations" (Moore, 2004, p. 304).

Mick Moore outlines a number of "political pathologies" that oil-rentier states demonstrate more than states that rely on a broad tax base (2004, p. 306-8):

1. "Autonomy from Citizens." The government and the people who control it have a guaranteed external source of income. This makes them financially independent of their citizens. Moore asserts that it is often more efficient to use wealth to buy off adversaries and fund a repressive intelligence service than it is to promote broad development.
2. "External Intervention." In the case of oil, many powerful states have a strategic interest in maintaining exporting regimes. This kind of support grants the regime further autonomy.
3. "Coupism and Counter-coupism." Those who do not have power are often tempted to seize power, and reap the economic rewards that power entails.
4. "Absence of Incentives for Civic Politics." Dependence on oil rents decreases the likelihood of citizens engaging in civic politics. Civic politics is "deliberative, institutionalized, and compromise-prone" (Moore, 2004, p. 307). This works through two mechanisms. The first is that citizens are less likely to feel that

they have a right to influence how the state spends 'their' money. The second is that when debate over practical issues such as taxation decreases, the likelihood of debate over more fiercely held issues, such as morality, increases.

5. "Vulnerability to Subversion." The failure of a state to tax its citizens can leave the state open to the "(armed) organizational challenge of competitors" (Moore, 2004, p. 307). This is because taxation not only raises money but also keeps state machinery active and the general population involved in the political life of the regime.
6. "Non-transparency in Public Expenditure." When public revenues come from a small number of external sources, it is easy for revenue and expenditure to be obscured.
7. "Ineffective Public Bureaucracy." There is little incentive to establish an effective bureaucracy, as the financial life of the state does not depend on it. In this kind of setting, jobs are often given more for patronage than for merit. Bureaucracies also tend to be distributive rather than extractive, as their purpose is not collecting tax to augment state income but, rather, apportioning external state income among the population (Cooley, 2001).

This list by Moore gives a fairly clear picture of the problems faced by rentier states. It is not exhaustive, and it misses some important information such as how the size of the rent affects the state, but it should suffice for our purposes (Moore, 2004).[2]

2. The effects of oil rents on democracy

The pathologies listed above contribute to both a lack of democracy and a lack of pressure to democratize in rentier states. This section outlines two main mechanisms that allow rentier states to subdue pressures to democratize. The effects of 'rents' on taxation and on patronage spending limit the possibility of democracy emerging in the rentier state and stress democracies that are already in place.

Michael Ross studied the effects of oil exports on democracy. He clearly expressed the idea that if a state receives sufficient external oil income then it will tax its population less (2001). This reduction of taxation diminishes calls for democracy by citizens. Jill Crystal (1990) describes this in her study of the effects of oil wealth in Kuwait and Qatar. When Kuwaiti rulers depended on revenue from merchants, they were forced to be receptive to the demands of the merchants, lest they leave for more amenable areas (Crystal, 1990). When oil revenue replaced taxation, however, the merchants lost their ability to take part in decision-making. This process was also pushed along by increased patronage spending (Crystal, 1990).

A lack of taxation-related pressure is compounded by the effects of patronage spending. Rentier states may be more likely to spend their wealth on political patronage, lessening calls for democratization (Ross, 2001). Dirk Vandewalle outlines this argument in his case study book on Libya (1998). Crystal explains that in Kuwait, "...the merchants were bought off collectively by the state. [...] In exchange for receiving a substantial portion of oil revenues, the merchants renounced their historical claim to participate in decision-making" (1990, p. 9). This reduced pressure for democratization.

A population that is not taxed tends to demand less accountability and representation from their government (Ross, 2001). In Ross' study of oil's impact on democracy, he concluded that "the oil-impedes-democracy claim is both valid and statistically robust; in other words, oil does hurt democracy" (2001, p. 356). His claim was equally applicable to oil states within and outside of the Middle East and, perhaps most interestingly, also was robust for states that receive mineral-based rents such as Angola, Cambodia or Peru (2001). This is important, because it shows that rentier theory is valid outside of a specific geographical location (it is often only associated with the Middle East) and with resources other than oil. This also demonstrates the power of fiscal policies in influencing regime type. In Ross' succinct words, "governments that fund themselves through oil revenues and have larger budgets are more likely to be authoritarian; governments that fund themselves through taxes and are relatively small are more likely to become democratic" (2001, p. 335).

2 For further information on oil-rentier states Camilla Sandbakken (2006), Michael Ross (2001), and Mick Moore (2004) all have insightful articles. Jill Crystal (1990), Kiren Aziz Chaundy (1997), and Dirk Vandewalle (1998) all have useful case study books on the topic.

III. APPLYING THE RENTIER THEORY TO FOREIGN AID

Oil and aid are not completely equivalent, so not all of the "political pathologies" listed above apply fully to aid-rentier states. Also, some new pathologies can be expected. Still, the similarities are numerous enough that the general rentier model appears to be applicable to aid.

1. What aid is a 'rent'?

Before examining the differences between oil and aid rents, it is important to outline what kinds of aid are considered rents. In order for aid to be a rent, it must be transferred to the state, its distribution must be strongly (but need not be completely) controlled by the state, and it must be fungible (meaning that it must be able to replace other forms of revenue—such as taxation). Under this definition, loans to the government certainly would always qualify as rents, while other physical aid (medicine, capital goods) would only count as a rent if they replaced current government spending in that sector. If aid took the form of medicine and treatments that were not provided by the state initially, then it would not be considered a rent.

2. Similarities between oil and aid

Both oil and foreign aid have the effect of making the state financially autonomous from society by enabling it to exist without expending effort taxing its citizens (Moore, 2001).

Aid rents, as defined above, accrue to the state in a manner similar to oil money. The money is transferred to the state directly and this enables the same autonomy problems that oil rents are related to.

Aid is considered 'unearned' in a way that is similar to oil because the state does not need to broadly mobilize its population to gather the money. In some ways aid may actually be less 'earned' than oil, as gathering aid does not require the state to invest in oil fields and infrastructure or hire workers before procuring the rent.

This model does not presuppose that the state has total control over how money is spent. Other groups, such as NGOs, can distribute the aid as long as the state has substantial say in how/where the aid money is spent. The strongest option would be if the state directly received untied aid. While 'control' is considered a similarity between oil and aid rents, Therkildsen correctly points out that "aid funds are never completely controlled by the recipient governments" (2002, p. 42). Still, as Knack writes, aid is commonly controlled by the state enough that it can be used for buying political patronage (2001).

3. Differences between oil and aid

It is important not to overplay the similarities between oil revenue and foreign aid. While they have much in common, they also differ in some ways that may force the rentier model (as it applies to oil) to be refined before it properly explains or predicts the behaviour of aid-rentier states.

Aid money is not as reliable as oil revenue. Oil is sold into a sellers' market. The human rights record of Saudi Arabia, for example, has little effect on exports of Saudi oil. Aid, on the other hand, has few 'sellers' and many potential 'buyers.' In this setting, aid money can easily shift to new countries in response to an aid recipient's actions or changes in donor preferences. This uncertainty may influence states toward being less dependent on aid money. It should be noted, however, that while aid dependency is usually not as large as oil dependency, it may still be quite sizable (Moore, 2001). In 1999, twenty-seven countries in Sub-Saharan Africa used aid to cover one quarter of government expenditure (Bräutigam & Knack, 2004). For seventeen of those countries, net aid equaled more than half of government expenditure (Bräutigam & Knack, 2004).

A major difference between oil revenue and foreign aid is in the fact that aid is frequently given with a goal, while oil rents are not. Aid donors often are trying to influence the recipient government—or, at a minimum, smaller sections of the state (Moore, 2001). This could potentially make aid money more damaging to democracy than oil money, as it not only detaches the state from its citizens, but it may re-orient the state's priorities toward those of the donor.

A final and related difference is that in the oil model, accountability seems to evaporate, while under the aid model, accountability may shift from citizens to donors (Bräutigam, 2002). Aid rents may create a dependency relationship between aid recipients and donors in ways that oil rents do not. This is because oil is sold to a multitude of actors with vastly different interests, while aid is usually provided by a smaller group of actors with

similar interests.[3]

4. The final model

Recognizing the aforementioned differences between oil and aid, the model described in section II.1 regarding oil can now be tailored to more properly fit aid. While aid rents do not create as strong an incentive toward coupism as oil can (Moore, 2001), aid may still increase the likelihood of interstate conflict, as groups may vie for the resources that aid provides.[4] Aid money is not related to external intervention, as the recipient state does not control a vital resource, but aid revenues do increase the state's autonomy from its citizens. It is likely that aid will also lessen the incentives for civic politics and promote an ineffective public bureaucracy. In most cases, aid dependency will not be as strong as oil dependency. Finally, aid may be more damaging to democracy than oil in some cases, shifting accountability onto donors and allowing donors to skew local priorities.

To reiterate the basic idea: states that receive sufficient external income (in this case, aid) are less likely to tax their citizens, and they are also likely to spend some of this money buying political patronage. A lack of taxation allows states to have fiscal autonomy from their citizens. A lack of taxation and increased patronage spending reduces the pressure to democratize. In this way, aid money may create 'rentier states' which are less democratic than their tax-funded counterparts.

IV. TESTS OF RENTIERISM AND AID

This model of aid is generally supported by a number of recent quantitative analyses of aid and democracy.[5] Djankov makes the case that aid hurts democracy more than oil does. Knack shows that countries with high levels of aid have reduced democratic institutions. These macro level studies show that the predictions of rentier theory are largely accurate, but they are not able to address the specific mechanisms that bring about declines in governance. This section closes by discussing the current state of support for the internal mechanisms of rentierism and related research gaps.

1. Djankov et al. - The Curse of Aid

This article by Djankov, Montalvo, & Reynal-Querol (2005) makes the claim that aid is actually worse than oil when it comes to democratization. It analyzes data on foreign aid and democracy in 108 countries between 1960 and 1999.

The authors make a number of insightful claims. First they note that, for many developing countries, aid money far outweighs natural resources rents (2005). In Burkina Faso between 1985 and 1989, "aid accounted for two-thirds of the government budget and 8 percent of GDP" (2005, p. 2). Over the entire sample period, aid accounted for forty percent of the government budget in Burkina Faso and thirty-seven percent of the budget of Mauritania (2005). Statistics such as these signify the importance of aid in many developing countries.

The authors show that these high levels of aid damage the political institutions in the recipient countries, "reducing democratic rules" (2005, p. 3). Democracy was quantified using the Database of Political Institutions (DPI) and the Polity IV Project, and its definition included measures such as the number of major decision-makers in a country, how chief executives are recruited, and other measures of electoral and legislative competitiveness (2005). Democracy is measured on a scale from one to ten (for Polity IV) or one to nine (for the DPI). On average, countries with the highest aid dependence (measured as aid over GDP) suffer a two-point reduction in democracy, while the least aid-dependent countries suffer a decrease of nine-tenths of a point for any five year period (2005). These results remain even when controlling for the aid that targeted countries with poor institutions, for the initial quality of institutions, for population growth, and for different date ranges and starting dates (2005).

The results are powerful. Not only is foreign aid negatively correlated with the democratic quality of institutions, but the effect is also worse than that of oil and the shocks from poor terms of trade (2005). The more

3 The current aid programmes of China or Brazil are interesting in this regard. If Chinese or Brazilian aid continues to grow it may upset the notion that aid is a Western activity representative of Western interests. This is an area of aid that should be watched with interest in the near future.

4 While Moore (2001) strongly asserts that aid and oil are dissimilar on the point of coupism, this paper takes a more cautious approach. Maren (1997) provides a strong argument that an important factor in the Somali civil war was the desire of different factions to control incoming food aid. This at least leaves the potential that in some contexts aid may increase tendencies towards inter-state conflict, if not full out coups.

5 Bräutigam & Knack have also published a complimentary work on the negative effects of aid on governance, where they found "there is a robust statistical relationship between high aid levels in Africa and deteriorations in governance, particularly when we correct for the tendency of donors to give more aid to African countries with improving, rather than deteriorating, governance" (2004, p. 276).

aid a country gets, the worse the institutions become (2005). This paper does not analyze why aid seems to cause worsening democratic institutions, so conclusions should not be stretched too far. Still, the link between aid and worsening democratic institutions cannot be ignored by development students.

2. Knack - Aid Dependence and the Quality of Governance

Knack's work measured the effect of aid on the quality of governance in developing countries. He found that high levels of aid erode the quality of governance (2001).

Knack measured governance using the International Country Risk Guide (ICRG) index, which combines three six-point measures of corruption in government, bureaucratic quality, and rule of law (2001). Aid dependence was measured as Official Development Assistance (ODA) over Gross National Product (GNP), and as a percentage of government expenditure (2001). The analysis covered sixty-eight to eighty countries (depending on the specific statistic) from 1975 to 1995 and 1998 (2001).

Aid is strongly and negatively related to shifts in the ICRG (2001). A "[f]ifteen percentage point rise in aid's share of GNP reduces the ICRG index by one point [out of eighteen]" (2001, p. 317). This kind of rise in aid's share of GNP is "well within the observed range of aid values in the sample" and "explains a substantial part [of shifts in the ICRG]" (2001, p. 317).

Knack counters the argument that aid's correlation with poor governance may be a result of donors targeting countries with declining governance by stating that aid donors are more likely to reward nations that improve their institutions and are less likely to donate to states that will "waste whatever aid they receive" (2001, p. 319). This suggests that aid may actually target states with stronger institutions, understating the influence of aid on poor governance (2001). This strand of reasoning troublingly implies that aid may actually focus on countries with relatively good governance and then (unintentionally) weaken it.

Knack uncovers many other interesting findings in his rather exhaustive paper. The negative influence of aid on governance implies that aid has serious (and negative) "consequences for economic growth" (2001, p. 319) and that the initial quality of a state's institutions has no influence on the negative effects of aid on these institutions (2001).

Although Knack's and Djankov's articles have their differences, they both strongly assert that aid is negatively correlated with democracy (through various mechanisms). Djankov controls for aid targeting states with deteriorating institutions, implying causation between aid and poor political institutions (2005). Knack argues for causation by claiming that aid donors give more to states with good governance, as they are less likely to waste the aid they are given. He reinforces this intuitive claim with data (2001). This strongly implies that when poor governance and aid are related, aid came first.

3. Internal Mechanisms and Research Gaps

While the previous research does not address the internal mechanisms of the aid-rentier model, it certainly supports its general claims. The aid-rentier model predicts the negative effects found by Djankov and Knack and offers very plausible explanations. While there is little consensus on the internal mechanisms of rentierism, there is scattered support for the mechanisms of reduced taxation and increased patronage spending.

Bräutigam & Knack found "higher aid associated with lower tax effort in Africa" (2004, p. 256). This was partially because what they called "aid dependent countries" – meaning countries with a high proportion of aid to relative to GDP – "may be inclined to underutilize their available sources of tax revenues" (2004, p. 264). A slightly older paper by Bräutigam has an excellent literature review on aid and taxation, where she concludes that "it is clear that low tax effort and high aid intensity occur together" (2000, p. 48). However, there is no consensus on the validity of the 'reduced taxation' mechanism. Other authors such as Devarajan et al. (2007) have found that aid has almost no impact on taxation. Part of the reason for this disagreement may be because already sparse public data "on revenues collected by aid-dependent countries is so poor that it sheds little light on the issue" (Bräutigam, 2000, p. 47). While not discrediting the 'reduced taxation' mechanism, the disagreement in the literature calls for more data, more research, and caution in applying programme changes based on this mechanism.

There is also support for the idea that aid flows increase patronage spending. Alexander finds that some "countries in sub-Saharan Africa have such impoverished economies that even rents from ... foreign aid (which can comprise half the government's budget) give officeholders enough patronage power to severely distort the viability of an independent opposition" (2005). Adam & O'Connell examined the political and economic effects of aid in Africa and found that "a sufficiently large inflow [of aid] induces the initiation of transfers to the favored group

even if such transfers were not initially present" (1999, p. 248-9). This suggests that increases in aid can damage the very policy environments that aid supposedly needs to function efficiently. While not written in the context of rentierism, a recent study of patronage spending in Argentina found that as governmental transfers (meaning aid) increase, administrative spending increases as well, potentially demonstrating a link between aid and patronage spending (Remmer, 2007). All of this shows that, while far from universally supported, the 'patronage spending' mechanism warrants further research.

The next step in testing the model is to carry out country-level case studies aimed at clearing up some of the confusion surrounding the internal mechanisms in aid-induced rentierism. Possible cases abound. There could be studies on how governance was affected when large amounts of fungible aid allowed Tanzania to maintain massive subsidies to state-owned enterprises and parastatals (Bräutigam, 2000). Another study could look at the political effects caused by Comoros having massive inflows of aid (equal to sixteen percent of its GDP), which lasted for thirty years (Djankov, Montalvo, & Reynal-Querol, 2005). A second interesting area of research could examine the effect of disaggregated Official Development Assistance (ODA) on governance. ODA is a vast umbrella term, covering everything from loans to support for refugees to debt cancellation (Padilla & Tomlinson, 2006). Most authors do not disaggregate ODA when analyzing its impact on governance. Breaking ODA down into distinct categories will likely yield more elucidating results and trends than are currently available. These two gaps seem to be particularly fruitful directions for future research.

V. IMPLICATIONS FOR AID AND DEVELOPMENT

The oil-rentier model has proven to be robust, and it is a powerful tool used by political economists and students of Middle Eastern studies. While the aid-rentier model is younger and less tested, it appears to offer a similar tool to students of development, and in the general study of aid.

In the second half of the Twentieth Century, about 2.3 trillion dollars were spent on aid (Djankov, Montalvo, & Reynal-Querol, 2005). Put another way, for each year of the 1990s, the average African country received five times as much aid (relative to their GNP) as the annual amount of the whole of Western Europe under the Marshall Plan (O'Connell & Soludo, 2001). Recently, in an effort to reach the Millennium Development Goals, the UN proposed a doubling of foreign aid (Djankov, Montalvo, & Reynal-Querol, 2005; United Nations, 2005).

The UN proposal for doubling aid clearly shows that aid has a role, or is seen to have a role, in development. Accordingly, development students should be aware of the potential unintended consequences of aid, especially when they are very negative. The aid-rentier model suggests that doubling aid without making any changes to its quality will have serious and negative consequences for democracy in recipient countries.

What can be done, then? Obviously this depends on what mechanisms rentierism operates through. While it is difficult to answer this question without proper case studies of aid and rentierism, aid donors should be wary of their aid contributing to a state's decreased dependency on taxation or increased patronage spending. The easiest way to deal with this would be to limit or decrease the kinds of aid that can replace taxation or fund patronage. However, this 'quick fix' will likely disrupt many useful and benign programmes. Better solutions may include tying aid to certain democratic indicators, such as recent elections or the establishment of meritocratic institutions. Another possible solution is to reduce the number of countries aid is given to, reduce the conditions attached to it, and increase selectivity, in an effort to increase competition between countries and boost incentives to maintain good governance in an effort to keep scarce aid. An additional option would be to give aid on the condition that it (or a portion of it) helps to build the capacity to tax, and does not substitute taxation. Some authors have found that giving aid as a loan instead of a grant increases tax effort in developing countries (Khan & Hoshino, 1992). It is worth examining the effect of mixtures of loans and grants. It may be possible to generate a large taxation effort by including a small loan component alongside a larger grant. A final option, used to good effect in Tanzania, would be to employ a "matching funds" system where aid is provided "only on the basis of matching funds from the government" (Bräutigam, 2000, p. 45). All of these ideas introduce their own problems and most of them are untested. Still, the problem of aid-rentierism must be addressed.

If aid is used properly now, then in the future it should not be necessary. Aid should eliminate its reasons for existing. This simple idea suggests that building tax capacity is an important step in any aid programme. Once a population can be locally taxed, it probably should be. We, as development thinkers and practitioners, need to further test the aid-rentier model and start thinking about—and implementing—strategies to mediate the potentially ill effects of aid. In their 2004 article, Bräutigam & Knack called for having an "exit strategy" for aid (p.

278). Improving taxation capacity should be seen as one possible option. The ongoing Iraq war has sharpened public awareness of the need for exit strategies. If aid donors neglect planning their exit strategies, then they too may become entangled in a global quagmire. The time to think about this was in the 1950s, but now will have to do.

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Repackaging the Past and Commodifying Culture: Constructing heritage in "cultural villages" in post-apartheid South Africa

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ABSTRACT – *Since the end of apartheid, South African tourism has gained an increasingly prominent position not only as an economic income generator, but also as a framework for and method of packaging the images and concepts that represent South African society and its past. One of the growing trends in South African tourism is the proliferation of "cultural villages." This paper critically explores the ways in which two cultural villages in South Africa portray and package pre-industrial African culture and the historical context in which this portrayal takes place. The analysis of these villages finds that themes of 'tribalism' and 'primitivism' dominate their displays and constructed environments. The historical roots of these stereotypes are explored, revealing embedded colonial constructions of 'ethnic' identities and 'unchanging' African cultures. Cultural villages therefore hold uncertain potential as methods for preserving and presenting South African heritage and culture, and as vehicles of economic and social empowerment in post-apartheid South Africa.*

RÉSUMÉ – *Depuis la fin de l'apartheid, le tourisme en Afrique du Sud a gagné une position importante non seulement comme un générateur de revenu économique, mais aussi comme un cadre et une méthode d'unir les images et concepts qui représentent la société de l'Afrique du Sud tel que son passé. La prolifération de « villages culturels » est une tendance qui se développe dans le tourisme en Afrique du Sud. Cet article examine en détail les manières dont deux villages culturels en Afrique du Sud représentent et démontrent la culture préindustrielle africaine et le contexte ou ces représentations ont lieu. L'analyse de ces villages a découvert que des thèmes de « tribalisme » et de « primitivisme » dominent leurs étalages et leurs environnements construits. Les origines historiques de ces stéréotypes sont examinées et révèlent des constructions coloniales d'identité implantées « ethniques » et des cultures africaines qui « ne changent pas ». Donc les villages culturels ont un potentiel incertain comme des méthodes pour conserver et démontrer la patrimoine et la culture Sud africaine, et aussi comme des modes de d'autorisation économique et sociale dans l'Afrique du Dus post-apartheid.*

INTRODUCTION

In the last decade and a half, tourism to South Africa has grown dramatically as the country has worked hard to become an international tourist 'hot spot.' Since the early 1990s, as South Africa began to emerge from the spectre of apartheid, its tourism industry has gained an increasingly prominent position not only as an income generator, but also as a framework for and a method of packaging the images and concepts that represent South African society and its past (Witz, Rasool & Minkley, 2001). One of the primary trends in the growth of tourism is the proliferation of 'cultural villages' and their consolidation as a new form of cultural museum. Here, 'cultural villages' are defined as complexes that are purposely built, with the help of 'cultural workers,'[1] to simulate aspects of the way of life of a cultural grouping as they were at a specific period (or over several periods) of time (Van Veuren, 2001). As of 2003, there were approximately 40 such villages open for

1 Because cultural villages are purposely-constructed tourist attractions rather than existing settlements, black South Africans from the relevant 'ethno'-linguistic groups are recruited (sometimes as families) to live and work in the villages. These 'cultural workers' are employed to perform and demonstrate a purportedly 'traditional' way of life for visitors.

business across South Africa (Hughes, 2003).

There has been a significant amount of academic interest in these villages. With "sustainable development" as a buzzword in post-apartheid South Africa, both government and independent academics have produced a considerable volume of analysis on the economic and social development potential of heritage tourism and cultural villages.[2] Ironically, however, the majority of this focus on the commoditization of heritage is pursued within an entirely ahistorical framework.

Nevertheless, two themes can be seen to dominate the displays and constructed environments of these villages: 'tribalism' and 'primitivism.'[3] In order to understand the extent to which these villages' representations are of pre-colonial history, apartheid versions of history or contemporary realities, this paper explores the historical roots of the stereotypes portrayed. Using the Lesedi and the Dumazulu cultural villages as examples, this paper seeks to investigate the ways in which these two cultural villages in South Africa appropriate, portray and package (pre-industrial) African culture and the specific historical context in which this portrayal takes place. The concluding analysis of the paper touches on the uncertain yet potential value of cultural villages as avenues for preserving and presenting heritage and culture, and as vehicles of economic and social empowerment. Moreover, the paper also argues that the contexts under which the two case-study cultural villages are specifically constructed do not address imperatives towards the empowerment of the peoples and communities involved.

CONTRASTING AND COMPARING TWO CULTURAL VILLAGES: LESEDI AND DUMAZULU

Lesedi, named by the seSotho word for "light," is one of the most popular and famous cultural villages in South Africa. Located less than an hour north of Johannesburg, the complex consists of five villages which representing different "African cultures." Lesedi opened in 1994 with the slogan "Cradle of Living African Culture" (Gerber, 2005). According to the website, the huts in the various villages are occupied by "a family of elders, their wives and their children" (Encounter South Africa, 2005). Dumazulu, on the other hand, is located in the KwaZulu-Natal province – or, as their website declares, "in the heart of Zululand" (Gooderson Leisure Corporation, 2005). This region of South Africa is home to the highest concentration of cultural villages, including Shakaland, which has been dubbed "perhaps the pre-eminent cultural village" (Hughes, 2003, p.5).[4] Dumazulu claims to be the "largest Zulu village of its kind in the Southern Hemisphere" (and, one would one would presume, by extension, the Northern as well) and is home to over 50 Zulu residents (Elephant Coast Bookings, 2005).

Because visiting these villages personally is not feasible, the analysis presented in this paper will be primarily based on the villages' promotional literature, augmented by some first hand accounts of visitors. In many ways, the promotion and marketing of these heritage tourism attractions is as important as the actual experience of them; advertising highlights the approach and goals of the village and constructs the expectations that frame tourists' experiences. The two cultural villages' official websites, promotions on general South African tourist webpages, and accounts by visitors in travel blogs reveal two important themes in the representation of African heritage. Firstly, both villages reproduce the dominant colonial conception of Africa as composed of distinct 'tribal' entities (Witz, Rasool & Minkley, 2001). Secondly, while proclaiming 'authenticity,' the cultural villages perpetuate romanticized, simplified and sometimes distorted images of 'primitive' black South African cultures (Goudie, Khan & Kilian, 1999).

Both Lesedi and, to a lesser extent, Dumazulu incorporate representations of multiple 'ethnicities' or 'tribes'. Lesedi, as mentioned earlier, contains five different "ethnic" villages; in the case of Dumazulu, the exteriors of the huts "resemble the different tribal peoples of Southern Africa" (Lesedi, 2005; Elephant Coast Bookings, 2005). Lesedi displays the Xhosa, Bapedi (Pedi), Zulu, Basotho and, in a recent addition, Ndebele, whereas Dumazulu's huts showcase the Zulu, Swazi, North Sotho, South Sotho, Xhosa, Venda, Tsonga, Tswana

2 For example, the following provide discussions of the economic development value of cultural tourism: Jansen Van Veuren, "Transforming Cultural Villages in the Spatial Development Initiatives of South Africa;" Jansen Van Veuren, "Capitalising on indigenous cultures: Cultural village tourism in South Africa." *Africa Insight* 33:1/2 (2003) 69-76; S.C. Goudie, R. Khan, D. Kilian, "Transforming Tourism: Black Empowerment, Heritage and Identity Beyond Apartheid," *South African Geographical Journal*, 81 (1999): 22-31.

3 Words like 'tribalism,' 'primitivism,' and 'ethnicity' are generally eschewed in current scholarship on South Africa in recognition of their role in constructing negative stereotypes of Africans, which were used to legitimize colonial domination. These terms are loaded with historical, political and racial meanings and negative implications. This paper will utilize these terms in its analysis of cultural tourism promotional literature, which uses them freely. In recognition of their problematic nature, and their direct extraction from a primary source, they will be contained in quotation marks.

4 For an in-depth analysis of Shakaland, see Carolyn Hamilton, *Terrific Majesty*: *The Powers of Shaka Zulu and the Limits of Historical Invention* (Harvard University Press, 1998).

and Ndebele.

The whole enterprise of cultural villages is based on the reproduction of specific ethnic stereotypes. In Lesedi, these are arranged side-by-side so that the tourist can choose from "the Zulu warrior nation, the proud Xhosa, the warm-hearted Pedi" (Lesedi, 2005). In both villages, the various 'cultures' are reduced to a few simplified and easily commoditized visual markers: the Zulus to their "fighting sticks and beehive huts," the Xhosa to their "distinctive white blankets," the Ndebele to their "colourful geometric paintings" and the Basotho to their "conical straw hats and thick, colourful blankets" (Magnetic North, 2005).

In Dumazulu, different groups are simplified even further until they can be codified in styles of interior decoration. Indeed, sleeping in huts "tastefully decorated in ethnic fabrics and tribal memorabilia" seems to be all it takes for tourists to have "an unrivaled *ethnic* experience… [and] gain a deeper insight into the tribal cultures of South Africa" (Elephant Coast Bookings, 2005, my emphasis). These descriptions of Dumazulu's accommodations repeatedly foreground the supposed 'tribal' nature of Africa's different 'ethnic' groups. In this way, the cultural villages perpetuate essentialist, colonial constructions of black Africans belonging to bounded and discrete tribal identities. These 'tribes' are then signified by a few stereotypical attributes (usually visual) that are upheld as representing and encompassing the grossly simplified 'tribal culture' in its entirety. Through stressing their uniqueness rather than emphasizing their shared features or interdependence, the brokers of ethnic cultures continue to define them in competition with other ethnic cultures (Hughes, 2003).

John Washington, a visitor to Lesedi, confirms the salience of this cultural stereotyping in his account of an 'educational' tour of the village. In a blog entry about the visit, he explains that his group was taught that "the Zulus are famous for their aggressive nature" and their "tribal fighting skills" (Washington, 2007). However, to ensure that the visitor understood that "not all tribes are scary," the Zulu were juxtaposed with the Basotho, who "are known for artwork and a peaceful nature" (Washington, 2007).

The Zulu and Basotho are thus reduced to caricatured foils for each other. However, perhaps more disturbing than this stereotyping is the conflation of 'nature' and 'culture' with reference to Africans; the "aggressive natured" Zulu demonstrate war dances and weapons, while the "peaceful natured" Basotho produce artwork. This evocation of biological determinism objectifies the Zulu and Basotho, denying them the individual and collective self-awareness and agency to negotiate and interpret their own heritage and identities in an ever-changing environment.

The construction of the African 'Other' as defined by innate and unchanging culture is reinforced by the prevalence of the theme of 'primitivism' in promotional material on the cultural villages. The representation and marketing of African cultures as 'exotic,' 'traditional,' and 'primitive' is intertwined with the portrayal of 'tribal groups' at Lesedi and Dumazulu. Lesedi's website and promotional materials are packed with language that evokes for the Western tourist images of a mysterious, primitive locale. In order to construct this imagery, the promotional material endeavors to conceptually situate Lesedi outside the 'modern,' urban, industrial experience. The first sentence on Lesedi's "Cultural Experience" webpage promises tourists "true rural African culture" (Lesedi, 2005). Immediately, "real" African culture is conflated with rural, rustic living in opposition to the urban reality faced by a growing number South Africans, black and white. Visitors are then promised an experience of the "mystical cultures of these ancient peoples, which are steeped in tribal folklore and ancestral traditions" (Lesedi, 2005). After dinner, guests are invited to congregate by the fire for a "cultural surprise" that commences with the drinking of a "Lesedi potion" (Lesedi, 2005). In this way, Lesedi relies on one of the internationally-recognised stereotypical images of African culture (which also bears striking similarity to pervasive stereotypes of indigenous North Americans) – 'tribal' dancing around an open fire, the sharing of mystical potions and legends of an unchanging, 'ancient' people.

Similarly, Dumazulu promises guests an "authentic African cultural experience" when they stay in the lodge's "traditional, ethnic accommodation" and learn about the people's "ancient manufacturing traditions" (Gooderson Leisure Corporation, 2005). The website's constant repetition of "authentic," "traditional," "ethnic" and "ancient" trivializes these historically loaded terms and evokes the concept of 'primitiveness' without actually using the word. This exoticization is evident in Dumazulu's description of their snake pit:

> As guests wander over the raised wooden walkways they can enjoy the added attraction of a snake pit which will be host to over 100 species of *indigenous and exotic* reptiles and a crocodile park with one of the largest crocodiles measuring 4 metres and weighing 350 kilograms (Gooderson Leisure Corporation, 2005, my emphasis).

This description brings to life imagery of African wilderness and danger. The effect is a portrayal of an Africa of creature-infested jungles – in essence, the Africa of nineteenth century travel novels (Schutte, 2003).

In exploring the 'snapshots of the past' provided by contemporary cultural villages, it is important to keep mindful of the processes and contexts through which colonial power systems legitimized certain interpretations of African histories while silencing others. Colonial and apartheid rule in South Africa was not only a political system of administration and discrimination. The system of colonial domination was built upon and bolstered by broad, ongoing processes of rewriting and reshaping African 'histories' and 'identities.' Some might argue that cultural villages showcase the pre-colonial African history that was long ignored and silenced by the colonial regime. Others, however, contend that the cultural villages do nothing more than naturalize, reinforce and perpetuate the constructions and stereotypes of apartheid. Understanding how and why these images of African history were created or reinforced is important in analyzing their historical value and the potential to be harnessed for social and cultural empowerment.

ETHNICITY AS AN ARTIFICIAL CONSTRUCT AND THE MANUFACTURING OF THE TRIBAL DIVIDE

The above analysis of Lesedi and Dumazulu cultural villages reveals that a central theme in both was the portrayal of unique and distinct 'ethnic' or 'tribal' cultures. However, numerous studies have challenged the notion of essentialized, primordial 'ethnicity' and instead demonstrated that throughout much of pre-colonial Africa, ethnic identity was fluid and ill-defined (Rawlinson, 2003; Ranger, 1983; Bekker, 1993). Ranger, one of the most well-known proponents of this theory, argues that in the nineteenth century, while societies certainly did value custom and continuity, custom was nevertheless "loosely defined and infinitely flexible," allowing for the maintenance of a sense of identity as well as for "adaptation so spontaneous and natural that it was often unperceived" (1983, p. 247). Rather than belonging to a single 'tribal' entity, most Africans moved in and out of multiple identities based on clan, profession, political affiliation and religion (Ranger, 1983). Southall echoes this interpretation by noting that pre-colonial societies were characterized by "interlocking, overlapping, multiple identities" based on ethnic, cultural and geographical communities (qtd. in Rawlinson, 2003, p. 5). Even linguistic groups, which were then used as the main marker of 'ethnicity' by the apartheid government, have been reevaluated as "inventions" of European missionaries who drew linguistic boundaries determining what was to be regarded as constituting a specific language (Makoni, 1998).

Therefore, far from being primordial units with defined boundaries, 'ethnic groups' on the African continent are largely a colonial legacy, created as administrative units, relabeled in ethnic terms and used as instruments for the control and (re)distribution of people and resources (Rawlinson, 2003). Although this process dates back to the nineteenth century, it was entrenched in South Africa in its most recent form by the apartheid government. The government created "nations" on the basis of its definition of "peoplehood." Drawing largely on its own ethnologists' work and that of conservative, primarily Afrikaans anthropologists, the government imposed "ethnicity from above," granting citizenship and entitlement based on membership in supposedly discrete cultural, political and linguistic groupings (Zegeye, Liebenberg & Houston, 2000, p.152; Schutte, 2003). Apartheid suppressed and distorted identity to the extent that it excluded all constituents of identity except 'race' and 'ethnicity.'

When the National Party came to power in 1948, one of the key elements of enforcing tighter racial segregation was a stronger emphasis on 'tribalism' and 'traditionalism' in African administration (Bekker, 1993). The existence of 'ethnic' divisions within the African population was central to their 'divide and rule' strategy of relegating the black majority to different "homelands" or "Bantustans." The principle of ethnicity first became established in law in the "Promotion of Bantu Self-Government Act" of 1959. The preamble to the act stated that: "The Bantu people of the Union of South Africa do not constitute a homogenous people but form separate national units on the basis of language and culture" (qtd. in Bekker, 1993, p.78). The national units were identified as North Sotho, South Sotho, Tswana, Zulu, Swazi, Xhosa, Tsonga and Venda. In later years, the Xhosa 'national unit' was further broken down into the Transkei and Ciskei. The Ndebele "national unit" was also added later, after its "discovery" by the apartheid government (Bekker, 1993, p.77).

By emphasizing allegedly naturally existing ethnic divisions, the apartheid government attempted to mask the racist, divisive and discriminatory nature of their policy and paved the way for stripping these black "nations" of their South African nationality. In 1968, the Chairperson of the Bantu Affairs commission stated the government's policy of "separate development" was one of "differentiation" rather than "discrimination." Black South Africans were differentiated "on grounds of nationhood, of different nations, granting to each self-determination within their homelands" (qtd. in Bekker, 1993, p. 80). This system of colonial rule by categorization needed to be legitimized on the basis of "nature" and "history." Cultural symbols and ancient customs were identified -- or created, where necessary – to give credence to the notion of unitary and timeless "tribes" (Rawlinson, 2003, p.5). The official ideology justified its policy of "homelands" as beneficent for the

preservation of ethnic culture (Schutte, 2003).

The "homelands" policy of segregation also meant that the white South African public, as well as whichever tourists might visit, had limited opportunities to observe indigenous 'traditional' culture due to restrictions on touring homelands. The system of 'ethnic' categorization and its emphasis on African 'tribalism' served not only to manufacture divisions within black South Africa, but also to highlight the 'natural' difference between white 'civilization' and black 'cultures" or 'ethnicities' (Enevoldson, 2003). Emphasis on the 'primitive' aspects of black African groups, as well as their rural 'traditional' lifestyles, served to legitimize their exclusion from mainstream urban life. Apartheid aimed to foster 'ethnic' identity in pursuit of the "separate but equal" fiction. Perhaps in the dramatically altered political climate of the "new South Africa," 'ethnic' identity has found new life as a commodity for tourist consumption.

At this point it seems fit to introduce the Shakaland cultural village as a point of comparison and contrast for the present analysis. In *Terrific Majesty*, Carolyn Hamilton argues that Shakaland, in its early years (1994-1997), was constituted of multiple layers of meaning and performance, and engaged in a complex negotiation of contemporary South African politics. Shakaland integrated a complex mixture of myth, reality and performance of Shaka "as open to negotiation with whites" (Hamilton, 1998, p. 203). Gerhard Schutte further claims that Shakaland did not hide the fact that it was based on a film set ("Shaka Zulu," a 1987 television miniseries, later released as a feature film), thereby acknowledging an element of myth in its reconstruction of Zulu life. Schutte credits the "anthropologically guided script" of the early years of Shakaland with endeavouring to "remove the exotic" and to "deconstruct the possible mystification" in the performances of Zulu "culture" (Schutte, 2003, p. 479). In the eyes of Schutte and Hamilton, this complexity of meaning and function served to offset and destabilize the '(in)authenticity' of Shakaland.

More than a decade later, however, Lesedi and Dumazulu do not invite a questioning engagement with South African history and its complex representations. Increasingly marketed for consumption by Western tourists, they promote mono-dimensional commoditization of constructed cultural difference (Witz, Rasool & Minkley, 2001). The success of the production and packaging of easily digestible heritage is exemplified by visitors who enthuse about the "cool dances" (Clark, 2000) or describe the entire experience as a post-breakfast "cultural treat" (Jovenatheart, 2007). Unlike Shakaland, which implicitly acknowledged an element of performance in its movie set village, Lesedi and Dumazula go to great lengths to establish this 'authenticity,' with websites that promise "real" experiences, "knowledgeable guides," and even "the royal Zulu stamp of approval" (Lesedi, 2005; Gooderson Leisure Corporation, 2005).

The entrepreneurs responsible for Lesedi and Dumazulu anticipate tourists' pursuit of both the 'exotic' and the 'primitive' (Schutte, 2003). For many tourists, this pursuit is an attempt to have a close but comfortable encounter with the 'real Africa.' The correspondence between nineteenth-century images of "pulsating tribes" and the performance of "ethnographic spectacle" in the cultural villages constructs and reinforces notions of exotic authenticity (Witz, Rassool & Minkely, 2001, p. 280).

James Washington's account of his visit to Lesedi further highlights the enduring power of colonial stereotypes in shaping the lens of expectation through which the Western visitor views the cultural village. Washington (2007) recounts that, "at first sight I was intimidated by the tribal gear…the animal skins, beads and head dresses reminded me of the bad guys in Neverland." Incidentally, the *Peter Pan* "bad guys" to which Washington refers were James Matthew Barrie's nineteenth century literary evocation of American Indians. Why would Washington, an American visiting a Zulu cultural village in twenty-first century South Africa, clutch at the ethnic iconography of an eighteenth century Scottish play? This conflation of stereotypes of indigenous groups, irrespective of time or place, demonstrates that European colonial imagery still looms large in the collective Western consciousness and plays a prominent role in constructing tourists' understanding and expectations of the 'primitive.'

Nicholas Thomas distinguishes between the pursuit of the 'exotic' and that of the 'primitive': "Exoticism has more to do with difference and strangeness than an antithetical relation to modernity" (qtd. in Schutte, 2003, p. 485). This distinction is relevant for the popularity of cultural villages. The intended audience and participants in these contemporary representations of indigenous culture are offered a "unique experience" of cultural difference in which the Other is constructed as strange in their customs and pre-modern in their experience. A blog entry from a 2007 visitor to Dumazulu highlights the thrill of both the 'exotic' – "the young unmarried ladies in the village were naked!" – and the 'primitive' – "my wheelchair was looked at with great suspicion and awe" (Sybilsybil45, 2007). To foreign tourists, 'difference' is represented in the stark contrast between their own worlds of experience in Europe, North America or suburban South Africa and the displays in the cultural village. Heritage tourism offers the possibility of escape from their worlds of modernity. This possibility of escape, however, has been dramatized, commodified, and prepackaged as a consumer item

(Schutte, 2003).

The "re-imagining and repackaging" of traditions is also being directed at South Africans. *Encounter South Africa* tourism magazine bills Lesedi as not only presenting "a rare insight into Africa for [the] overseas tourist," but also "enabl[ing] white South Africans, who have so long been separated from Africa, the opportunity to attain a better understanding of how some of our rural tribes live" (Gerber, 2005). Interestingly, one aspect of this new marketing strategy is to frame cultural villages as educational opportunities for South African children. Lesedi's online guest book boasts a letter of thanks from Lucy Downs of Sparrow Schools Educational Trust. Downs notes that many students at Sparrow Schools are orphans from care centres who have "missed out on learning about their cultural past." She thanks Lesedi for providing students with "a snapshot of where they have come from" (Downs, 2007). While this letter may suggest a promising service dimension for cultural villages, if these tourist attractions are going to be accorded legitimacy and authority as museums, then their displays and depictions of history must be correspondingly scrutinized in more depth.

The enthusiasm of Sparrow Schools for Lesedi as a learning opportunity highlights the importance of examining *who* is behind the scenes directing the 'cultural workers,' and teaching South African children about their histories and cultures. Before the 1990s, colonial and apartheid power structures in South Africa ensured that 'white' voices were privileged to articulate 'official' versions African histories and define African cultures. Interestingly, in both Lesedi and Dumazulu, the metaphorical final word on 'authenticity' comes from white 'experts.' Dumazulu boasts that: "World renowned and respected anthropologist, Graham Stewart, known as the 'White Zulu'…lives at Dumazulu and manages the entire Dumazulu complex" (qtd. in Schutte, 2003, p. 480). Similarly, Lesedi's Cultural Director (also one of its co-founders) is Kingsley Holgate, a well-known Afrikaner "adventurer" and "explorer" with a "passion for Africa" (Magnetic North, 2005). Whites are constructed as the 'experts' on black African culture and are granted authority as mediators of public discourse and displays of African heritage. Both Dumazulu and Lesedi were constructed and are controlled by predominantly white-owned major corporations. Both draw on white 'experts' as the authority on 'African cultures;' both hold profit, rather than preservation of history, as their primary objective.

The economic dimension of who controls the reconstruction and presentation of African heritage and history is an important one. Cultural heritage is increasingly coming to be regarded as a resource for the tourist industry. While indigenous cultures are the "*raison d'etre* for the existence of cultural villages" (Van Veuren, 2003, p. 70), groups or individuals require additional resources like land ownership, business and tourism skills, and access to capital in order to mobilize their potential. Colonialism and apartheid radically marginalized indigenous South Africans from these very resources, while conversely privileging whites. This is reflected in the predominance of whites in cultural village ownership and senior management positions (Van Veuren, 2003).

This concentration of discursive and economic power in white hands raises critical questions about indigenous ownership of culture as both identity and resource in the "new South Africa." Cultural villages are presented as a way to "know oneself, to learn about the Other and to become a country" (Witz, Rasool & Minkley, 2001, p.282). Ironically, at both Lesedi and Dumazulu, the cultural distinctiveness of "primitive" indigenous groups, as defined by the apartheid regime's divide-and-rule policies, is being reproduced in an era that is supposed to have superseded it.

If economic profit is the driving force and justification of cultural villages, then Lesedi and Dumazulu are examples of relative success. However, these two villages essentially function to reproduce dominant media images of 'tribal,' pre-industrial African society. As Witz, Rassool & Minkley (2001) explain, in cultural villages, culture and history are brought together in a "timeless zone as a kaleidoscope of frozen ethnic stereotypes" that correspond with dominant tourist images of Africa. In these "theatres of memory," (p. 280) identities and histories are scripted, rehearsed and performed. In Lesedi and Dumazulu, romanticized versions of indigenous South Africans' pasts are performed by an indigenous cast, directed by white business men and anthropologists, and performed for a predominantly white audience.

Increasingly, however, villages are being opened and operated, with varying degrees of success, by both indigenous entrepreneurs and by government agencies as vehicles for job creation, economic development, and social empowerment (Van Veuren, 2003). This trend shows promise in terms of providing opportunities for black South Africans to exercise control over and to access the economic dividends from representations of African histories in tourist attractions. However, the long-term social empowerment potential of cultural villages has as much to do with the ways in which villages interpret and present 'pre-colonial' African ways of life as with the number of jobs they create. While there are no guarantees that indigenous ownership will address the problematic colonial stereotypes presented in cultural villages, it will represent an important relocation of the power to articulate and mediate histories and identities in post-apartheid South Africa.

CONCLUSION

This paper has identified two central themes in South African cultural villages' portrayal of African culture –'tribalism' and 'primitivism' – and examined the inaccuracy of this articulation of pre-colonial African societies. While promising true, 'traditional' African cultures, Lesedi and Dumazulu instead repackage colonial- and apartheid-defined 'ethnic' identities. Rather than providing tourists and visitors with any opportunity or stimulation to question representations of African histories, these attractions simplify, commodify and display African cultures as static, unchanging and one-dimensional. The economic development potential of cultural villages cannot be wholly analyzed in isolation from their function as mediators of history. It is not enough for cultural villages to pursue economic profit, when in the process they entrench stereotypes and normalize 'ethnic' divisions that have been problematized since independence.

Some might argue that all cultural villages, including Lesedi and Dumazulu, promote a pride in indigenous heritage that is more important than the accuracy of historical details. However, the construction of histories and historical identities of indigenous South Africans has had very real political, economic and social implications over the last century. As the tourism industry gains weight in the "new South Africa," commercial tourism's appropriation of 'heritage' should be the subject of inquiries into the ways in which African histories are presented, and who controls and profits from their portrayal. Cultural tourism must be subjected to increased political, academic and historical scrutiny in order to create opportunities for conceptions of static culture and ethnicities to be critiqued and challenged, rather than fixed and memorialized in a cultural village.

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Madina Market Women: An Urban Journey toward Independence

Jennifer Reddy

"Apart from the money, when I come around [to the market] I have this kind of social interaction with the women who are around, we talk on all issues. When I go home I don't have time to talk with anyone else. I pray…and when the work is done, I bathe and sleep"
(Sophia, groundnut trader)

ABSTRACT – Women traders in Africa, like women around the world, undertake the triple gender role that is not only demanding of time, but of labour as well. Madina market women of Accra, Ghana demonstrate how they organize themselves in their informal market to not only feed and clothe their families, but to trade and manage their communities and meet both practical and strategic gender needs. This study captures the voices of Madina market women, who explain what gendered roles they undertake and how they attempt to fulfill practical and strategic gender needs. Madina market proves to be an important place of social cohesion and potential independence for women traders. Despite these achievements, there remains a need for Madina market women to access formal economic and political networks. This paper explores how those formal networks can be accessed and utilized by Madina market women to build upon their market-based foundation of independence.

RÉSUMÉ – Les commerçantes en Afrique, comme les femmes autour du monde, sont engagées dans trois niveaux de responsabilité dictés par leur genre (triple gender role), qui exigent non seulement leur temps, mais aussi leur travail. Les femmes marchandes de Madina à Accra, au Ghana, démontrent comment elles s'organisent dans un marché informel pour non seulement nourrir et vêtir leurs familles, mais pour marchander, gérer leurs communautés et combler les besoins pratiques et stratégiques de leur genre. Cette étude capture les voix des femmes marchandes de Madina, qui expliquent à quelles responsabilités dictées par leur genre elles s'engagent et comment elles essayent de satisfaire leurs besoins pratiques et stratégiques. Le marché Madina se révèle un site important de cohésion sociale et d'indépendance potentielle pour les femmes marchandes. Malgré ces accomplissements, il reste un besoin pour les femmes marchandes de Madina d'accéder aux réseaux économiques et politiques plus formels. Cette rédaction explore comment ces réseaux formels peuvent être accédés et utilisés par les femmes marchandes Madina pour élaborer sur leur indépendance basée dans le marché.

INTRODUCTION

Leaving the Accra city center heading east past the University of Ghana, Madina Market presents itself abruptly at the heart of the East-Ga District of Accra, the capital city of Ghana. The hustle and bustle of Madina is said to be as intense as any other open-air market of Ghana (Ruby, a Madina trader), neatly set up off the main "Old Road." The Main Station is located across the street, offering the perfect opportunity for those traveling to and from the city center to pick up goods for the evening meal. Running consistently (13 hours per day, seven days per week) Madina is a reliable and convenient market. The goods sold in the market

range from yams and cassava to dried fish and fresh, butchered bone-in meats. Stalls of clothing, linens and foodstuffs weave in and out of the walls of a large cement complex.

Madina market is smaller than both Makola market, which is found south of the city center, and the Kumasi wholesale market north of Accra. Like most markets in West Africa, Madina is created, operated and overseen by a diverse group of women (Clark, 1994; Little, 1973; Robertson, 1995) operating a variety of enterprises. Madina attracts women from a variety of ethnic groups: the Akan, including the Ashanti and Fanti, the Ewe, in addition to the indigenous Ga population (Robertson, 1984). This contributes to the cultural diversity that is equally prevalent in language: Madina market women generally communicate in a variety of Twi, Fante, Ga, Ewe, Hausa and some English.

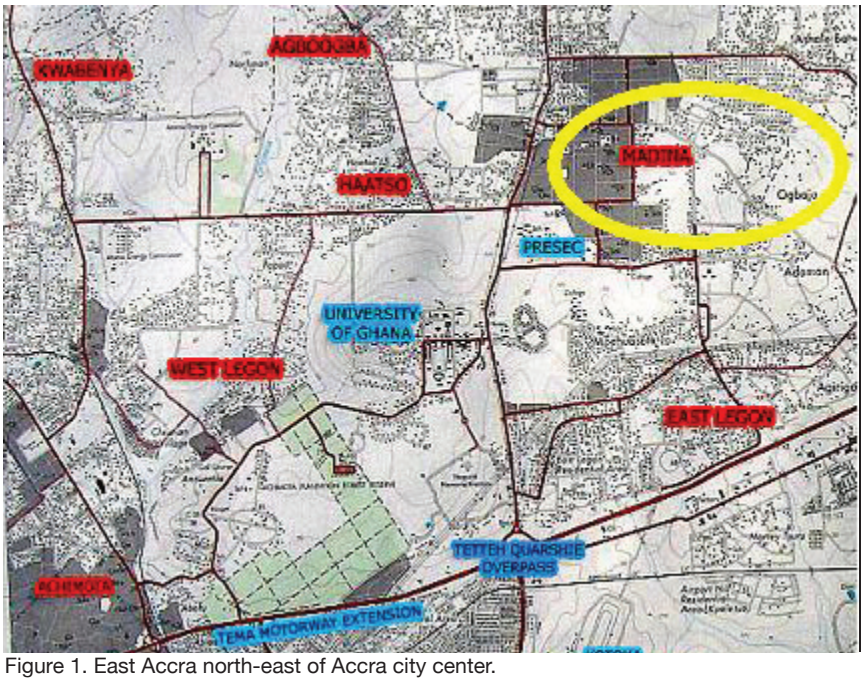

Figure 1. East Accra north-east of Accra city center.

Market women also represent unique examples of social and economic transition as traditional Ghanaian roles are challenged, restructured, lost, and reinvented as a result of modern urban demands. Ghana experienced economic monetization, which, along with Christianization, contributed to significant socio-economic change.[1]

Colonization encouraged the migration of men into urban centers in search of cash generating opportunities and thus resulted in a disruption of the traditional family structure.[2] With this structure dismantled, women were left in rural areas isolated from possible urban income. Christianization, as a part of colonization, highlighted the position of the woman in the home and thus discouraged the movement

1 Traditional economy was characterized by strong links between family and business; it was not uncommon to find a wife working cooperatively with her husband on the farm while trading any agricultural surplus (Hajnal, 1965 cited in Robertson, 1995, 1976; McCall, 1961). Kassam & Wuttunee (1995) explain this as a "gendered interdependence" (p. 57). Cooperation was necessary since economic stability depended upon the central importance of family (Robertson, 1976). The process of colonization pressured both monetization and migration, and thus the departure from family-based cooperation. In the city, most men became artisans and clerks, and these positions did "not lend themselves as well to patterns of husband-wife cooperation" (Campbell & Steel, 1982; Robertson, 1976, p. 118). Consequently, women became more economically independent, acquiring their own cash, most notably in market trade (Arhin, 1979). Monetization affected gender roles most seriously in this way. Opportunities for cash acquisition came with the dichotomization of gender roles, however, thereby lessening the possibility of cooperation. While there is no clear break between rural and urban, there is a kind of "rural-urban continuum" (Caldwell, 1969, p. 20). Ghana experienced rapid migration compared to other West African countries, the most significant increase being between 1948 and 1960 when the urban population increased 9% per year (Caldwell, 1969). Men experienced a relative ease of mobility into the cities due to colonial demands for auxiliaries, but women found it harder to extract themselves from family networks that were in need of their work for a less-than-welcoming urban sector (Caldwell, 1969; Coquery-Vidrovitch, 1997; Boserup, 1970; Robertson, 1995). A combination of exploitation, slavery and young marriage, however, was often enough to push many women to "flee and seek out the opportunities of colonialism's urban centers" (Conquery-Vidrovitch, 1997, p. 74). The situation for female migration took a serious turn during and after World War II as "Africans understood that they could no longer do without the cash from women's work in the cities," and "Europeans recognized that the work done by people in stable households was more profitable" (Coquery-Vidrovitch, 1997, p. 78).

2 Colonizers conveyed the strict perception of "woman as mother, responsible for care of the household, cooking, and children […] unemancipated from either father or husband" (Coquery-Vidrovitch, 1997, p. 75). This aspect of colonization is critical because it identifies the importance of reproductive roles in the lives of Madina market women. However, Christian missionaries generally failed to recognize that, in the urban sphere, female traders must participate in the productive sphere to fulfill reproductive duties (see below for definitions of these terms). Boserup (1970) explains that "[i]n no other field do ideas about the proper role of women contrast more vividly than in the case of market trade" (p. 87).

of women into urban centers.[3] Due to economic necessity, however, many women forced themselves into urban centers in search of income generating opportunities, over-stepping prescribed gender roles.

This study aims to explore how the dynamic urban gender roles of Madina market women have shaped their participation in market trade, and how this is inextricably linked to household and community responsibilities. Furthermore, the paper seeks to explain how women use Madina market as a venue for productive activity and to fulfill practical and strategic gender needs (to be defined below).

CLARIFYING TERMS

Gender roles can be defined as context-specific and therefore unique to a culture and dynamic within a culture (Kassam & Wuttunee, 1995; Whitehead, 1979 in Moser, 1993). Gender roles can include behaviours, expectations, dress, and other cultural characteristics that are socially constructed to have specific connotations.

As a part of gendered expectations, many Madina market women experience the burden of 'the triple role' that is best introduced as three inter-related parts. First, Caroline Moser (1993) and Karim-Aly Kassam (2001) describe women's traditional reproductive work as childbearing and rearing responsibilities, in addition to domestic labour. Second, productive work can be understood as either the work done by women for payment in cash or kind or, more generally, any production visible in cash economies associated with an exchange value (Moser, 1993). Finally, community management concerns the provision, organization, and production of goods and services for collective consumption in the local community (Moser, 1993; Kassam, 2001).

In order to understand why Madina market women undertake the triple role, it is important to remember that these roles are intertwined with both practical and strategic gender needs. These needs vary according to socio-economic context, class, ethnicity, and the religious structures of societies (Moser, 1993). Kassam (2001) explains that practical gender needs arise out of traditional divisions of labour between men and women and may include, in the case of Madina market women, such things as securing food, clothing, childcare, school fees, books, and sometimes rent. They can be understood as the practical items of necessity that stem from the specific roles of women (Kassam, 2001).

Strategic gender needs seek to address issues of power and control within institutional and larger societal networks that limit the ability of women to realize their aspirations (Kassam, 2001). Strategic gender needs may include the removal of sexual divisions of labour, alleviation of domestic labour/childcare, abolition of institutionalized gender discrimination in owning land or property, political equality, action against male violence and control over women, access to credit, and choice over childbearing (Moser, 1993). If met, strategic gender needs challenge women's subordinate societal position, change existing roles, help women to achieve greater equality and provide "women with enhanced opportunities for self-reliance and cooperative development" (Kassam, 2001, p. 56; see also Moser, 1993).

METHODOLOGY

This research paper employs a qualitative methodology to explore why and how Madina Market women undertake trading (a productive role) in conjunction with reproductive and community management roles, how the triple role is used to fulfill practical gender needs and if this can lead to the fulfillment of strategic gender needs. Qualitative data is supplemented with secondary literature concerning gender analysis and women traders.

Six Madina market women were interviewed through informal, face-to-face, semi-structured interviews (see Appendix). Two out of the six market women (Mansah and Sophia) have been assigned pseudonyms, while the remaining four chose to use their real names: Abigail, Gloria, Nana Ama and Stella. Mansah and Abigail both run their stalls independently. While Abigail specializes in tomatoes and onions, Mansah sells a variety of fruits and vegetables. Sophia sells groundnut paste (following the tradition of her mother) and sells alone. Nana Ama

3 Christianization does not present itself in data from Madina market women. It is observed that, by undertaking the triple role (to be defined below), Madina market women have already subverted the Christian perspective of the 'woman's role.' Thus, Christianization will not be analyzed as an obvious and immediate factor in the lives of Madina market women, but it should not be disregarded, as it plays a key factor in the determination, challenging, and transforming of gender roles.

sells a variety of fruits and vegetables with her sister and plans only on selling until she can set up a hairdressing business. Finally, Gloria is an egg seller with her mother Stella and several other female relatives. Gloria helps her mother so that her younger brother may attend school. Throughout this paper, these six women will be referred to as Madina market women and/or traders, and identified by their individual names and contributions where appropriate. It should be acknowledged, however – taking into account Mohanty's (1997) critique of (Western) feminist strategies in her work Under Western Eyes: Feminist Scholarship and Colonial Discourses – that this study consciously seeks not to bolster a universal definition of "the third world woman" (p. 79).[4] Thus, while attempts were made to interview women from various parts of the market, this study acknowledges that the general label of Madina market women does necessarily represent all of the women at the market – rather, just the six who agreed to participate in this research project. In addition, Ruby (real name), a wholesale "Queen Mother" was interviewed. Ruby was appointed to her position through a lineage and by the community, because of her reputation in settling socio-political disputes between her community and the government. As a Queen Mother, Ruby is in charge of producing and selling her own produce at a wholesale level to retail-level market women. Understanding the significance of such a contribution is essential to gain an intimate understanding of the lives of Madina market women as they fulfill multiple roles and seek to satisfy an array of needs.

Figure 2. Madina market women trading fish and groundnut paste in Accra, Ghana. (Photo by Jennifer Reddy)

SATISFYING PRACTICAL GENDER NEEDS: The Interconnected Link to the Triple Role

a.) Reproductive Roles

For traders, practical gender needs arise out of reproductive roles. Madina market women need[5] to fulfill childcare and household maintenance duties that guarantee the continuity and reproduction of the labour force. It is through this 'reproductive' care, socialization and maintenance of lives that these women secure the next generation (Moser, 1993) – and, as we shall see, potentially their own future well-being. The reproductive role of a market woman is usually a life-long commitment that undergoes transitions as a woman bears more children and they grow older. Generally, Madina market women support between one and three children under the age of 18 who live at home (Abigail; Stella; Nana Ama; Sophia; Mansah). In addition to bearing children, a Madina market woman must rear her children, ensuring that food, shelter and clothing are provided throughout each child's dependent life, usually until age 18.[6]

4 Mohanty (1997) explains this as the assumption of the homogenous notion of the oppression of women as a group. Presupposing 'women' as a group that is 'exploited' or 'powerless' fails to expose the "ideological specificities that constitute a particular group of women as 'powerless' in a particular context" (Mohanty, 1997, p.81). Assuming that all 'third world women' have the same problems, goals and interests, runs the same risk of labelling. Additionally, although it is outside the scope of this paper, it is important to acknowledge the importance of the household and greater community as spaces in need of a gendered analysis, as well as for confronting race and class issues (Johnson-Odim, 1991). As a result, it is important to look at this study as a partial snapshot in the larger picture of the lives of Madina market women.

5 The 'need' for Madina market women to fulfill duties associated with childcare and household maintenance lies in both socially constructed 'needs' as well as practical needs. Socially, the duties of childcare and household maintenance often fall upon the woman. Practically, the 'need' arises out of 'securing' the next generation as care persons for elder family members, including a mother that is a trader.

6 In theory, a husband's contribution to his wife and family is in the form of 'chop money.' Chop money should be enough for rent, food, clothing and school fees for children. In reality, chop money is often insufficient so that market women trade 10-12 hours per day just to make ends meet (Ofosu, personal communication, 2006). It is nonetheless difficult to generalize the housing costs of market women. While some women, like Abigail, report that they live in a shared housing compound, others did not discuss their living

b) Balancing Productive and Reproductive Roles

Madina market women often could not seem to separate their child-rearing responsibilities from their market participation. Essentially, Madina market women trade because they have children, and thus they become full-time reproducers and producers. Madina market women balance a variety of reproductive duties before and after a 10-hour day in the market (Abigail; Stella; Gloria; Nana Ama; Sophia; Mansah). In the morning, before getting herself ready to trade in the market, each woman performs a variety of cleaning, washing, and cooking in addition to getting children ready and to school (Abigail; Stella; Gloria; Nana Ama; Mansah). Mansah summarizes her daily routine as it is saturated with reproductive duties:

> At 4 am I wake up to do house chores like washing and cooking and then I come to the market by 7:30 am and then leave the market to go home and do more chores until 10 pm before I sleep.

Many Madina traders fulfill both reproductive and productive roles on a full time basis.

c) The Productive Role: Fulfilling the Reproductive Role and Practical Gender Needs

Madina market women confirm that the earnings from productive market trading helps them to fulfill some of the reproductive responsibilities that foundationally ground their practical gender needs (Abigail; Stella; Gloria; Sophia; Nana Ama; Mansah). The profits from trading help Madina market women to obtain a variety of things. Sophia says:

> The market gives me lots of benefits because as I am speaking to you now, I don't need anything. My needs have been satisfied because I can use the profits to get everything I need.

Sophia explains that trading enables her to pay school fees and purchase books for her children. "I give money to my children as a form of complement since my husband also provides money for the children," she says. The income earned by Sophia provides security for her family: "My first born had issues in school and my husband's finance was insufficient, so I had to pay."

Mansah and Stella support their families in a similar way. Mansah's trading provides greater security for her family. "My husband's work is very slow right now," she says, "so primary income is provided by me only." Mansah's trading income is used to pay her children's school fees in addition to supporting the entire household since her husband is out of work. Stella explains that "everything done comes from money from [the] market – school fees [and] house rent." Gloria adds, "Money from the market pays for food."

Madina market women illustrate that both reproductive and productive roles are interconnected as they weave together the means to satisfy their practical gender needs. The former role is satisfied largely through the fulfillment of the latter, which is undertaken to complement those reproductive duties requiring cash. Thus, practical gender needs help to contextualize the necessity of intimately combining productive and reproductive duties.

d) Community Management: Completing the Triple Role

Productive market participation and reproductive duties are highly reinforced by the community management roles of Madina market women. These roles in the marketplace can be illustrated in three ways. First, women collectively and cooperatively contribute to the upkeep, clean-up and maintenance of the market area. Market upkeep explicitly fulfills the productive role of Madina market women, through providing a clean and welcoming space for market-goers and for the traders themselves.

Traders are responsible for all trade set-up and maintenance, and pay taxes to the local government. However, the legal status of Madina market remains unclear. Although traders contribute to local government

situations in much detail. Nana Ama lives with her sister, who is also a trader, and her children. Both women contribute to household expenses. While some market women receive income supplements, these are insufficient to satisfy all needs. On the other hand, some market women – like Abigail, Stella and Mansah – never mentioned the assistance of a family member or friend. Only Sophia made reference to her husband living in the same household. Therefore, the productive contributions of traders may often make up the primary – perhaps the only – income of the household. While the household structures of these women play a key role in understanding the relationships between traders, husbands and other family members, the information given in the interviews focused on life at the market and not on the individual living arrangements of these women. Therefore, due to the varied and somewhat ambiguous nature of housing situations, it is difficult to discern exactly what total living costs are for each of the women.

through taxes and levies, trader security in Madina is threatened. Instead of receiving positive governmental attention, traders are occasionally forced to move out (Nana Ama). The discrepancy between paid taxes and lack of government support is unclear, since Market women did not discuss this in detail. Nonetheless, it is necessary for traders to collectively undertake the set up, take down, clean up and maintain the market place in order to fulfill productive roles more effectively.

Second, traders in the market support each other in balancing the triple role by swapping responsibilities. Sophia explains, "To cook for my family I have to leave the market at 3:30 pm and have other traders take over for me. They give me all the profit and accounts when they see me the following day." The use of the community management role in this instance is twofold. Sophia is able to satisfy her reproductive demands that require non-monetary means to be fulfilled while maintaining a productive role at the market by means of negotiating her community management role.

Third, traders are often responsible for several children scattered around the stalls. Reproductive duties undertaken collectively at the market are a key aspect of the community management role, and are a vital illustration of how market women understand, help and support each other. The ability to trade in the same space as caring for children is an important aspect of balancing the triple role for market women.

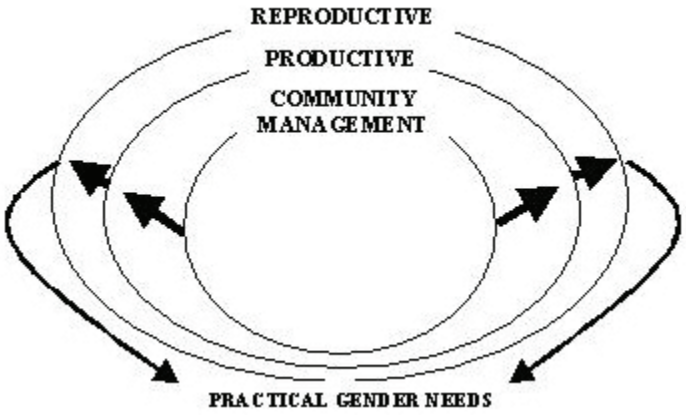

Figure 3. Practical gender needs stem from reproductive roles. Community management roles support productive roles that support reproductive roles.

Community management demands, while sometimes burdensome as a third role, bind together the ability of traders to fulfill productive and reproductive duties. Effectively, although socio-economic change from monetization has increased the productive burden upon women – in addition to reproductive and community management burdens that appear to grow with the acquisition of cash – Madina market women must simultaneously undertake productive, reproductive and community management roles in order to satisfy practical gender needs. Therefore, Madina traders sometimes have to stretch themselves to make ends meet and to fulfill these roles.

PRACTICAL GENDER NEEDS:
An Entrance Point to Meet Strategic Gender Needs

It is simple to state that, theoretically, once practical gender needs have been satisfied, strategic gender needs ought to follow automatically (Moser, 1993); this, however, is not the case for numerous Madina market women. While basic, practical gender needs appear to be fulfilled for many of the women through the market, this has not necessarily signified a direct movement toward meeting strategic gender needs. Nevertheless, in the process of meeting practical gender needs, some traders are beginning to identify economic strategic gender needs and simultaneously find themselves suspended within the potentially valuable social network of the marketplace.

a) The Productive Venue:

i) The Social Network: Meeting Practical and Strategic Gender Needs

The plurality of Madina market women should not go unrecognized when assessing the potential of the market as the venue for social interaction and even empowerment. Although Madina Market women come from different parts of the country, hold different cultural norms and speak different languages, traders find many ways to learn about each other, share ideas and communicate in meaningful ways. Traders recognize that the social network of Madina market facilitates the creation and sharing of economic opportunities among female relatives (Abigail; Gloria; Mansah; Nana Ama; Ruby; Sophia). Additionally, the market is recognized as a place for learning and sharing knowledge, building identity, belonging, and connecting with other women.

These aspects of market participation are spontaneously created, and offer valuable potential for meeting both practical and strategic gender needs. Women must trade in order to support their children – this practical need is one that is recognized among all the traders. In the process of meeting this need, however, traders have also created a solid network with other women. Understanding each other and sharing burdens and successes is as important for Madina market women as the cash earned in the market. Through participant observation it was evident that traders had close friends in the market. Sharing conversations, trading childcare duties, helping to carry produce, assisting in cleaning up spoiled produce and just chatting were noticed commonly within the market.

The feeling of community is evident in all parts of the market. Women enjoy occasional Christian concerts in the market, socializing while trading side by side, regardless of product; they share stories in rich languages and appreciate each other's company while bartering and trading in the sweltering heat. As the quote at the beginning of this paper suggests, Madina Market, for many women, is a key place where social interaction is realized. Abigail explains that, "Sometimes you gain, other times you lose, but in all it is still good to be in the market than to stay at home." While the market is yet another venue of work it proves also to be a valuable space not only for traders seeking cash, but also for utilizing the social network of the market to further meet strategic gender needs.

For many Madina market women, economic independence and financial control are the ideal outcomes of a socially productive role in trading. Meeting such economic strategic gender needs through knowledge-sharing and communication are each integral parts of the social network of the market, as will be further detailed below. The social network of Madina Market can be understood to be somewhat of a gateway for women to develop trader knowledge – and also to develop the power to address larger strategic gender needs. Madina traders organize themselves, and through this social cohesion have the potential capacity to collectively address and achieve strategic needs that are both economic and political. Traders have organized themselves today around the realization of similar struggles, and it is in this same way that traders can continue to overcome challenges in the future (as discussed below).

ii) Realizing Independence and Empowerment

While honouring the contextual nature of gender roles and needs, it is equally imperative to value the contextual nature of empowerment. The definition of empowerment – a long disputed term – is informed in this paper by the work of Naila Kabeer (1998) in her study of empowerment and credit for women in Bangladesh. Kabeer (1998) explains empowerment as a multifaceted process of change, which – importantly – recognizes that there can be various routes to positive impacts. Madina market women are not a homogenous group; thus, they do not subscribe to one type or definition of what empowerment is or how it could be achieved. However, similar themes do emerge in the words of Madina market women when asked about what the market does for them.

Madina market women report that their participation in the market makes them feel independent through giving them stability and security (Abigail; Sophia; Stella; Gloria; Nana Ama; Mansah), as well as satisfaction and pride for bringing something of "value" to the household (Kabeer, 1998). This value should be understood as something beyond economics; however, it extends from the necessity of economic transaction. Abigail and Mansah state that the acquisition of cash from trading allows them to meet a variety of immediate needs. Abigail illustrates her feelings on trading:

> I really have this kind of internal satisfaction with the work that I'm doing. I'm really excited and feel good about the work that I do…It [the market place] is important for me. At the time when [my] husband does not give me money I get the money I need from the market. I gain security for myself.

Trading is an important part of life for Abigail not only because it secures her economic situation, but also because she is ambitious about the work that she is doing. Being able to provide for her children and household on her own account, Abigail illustrates how economic security can lead to feelings of independence and personal security. Mansah shares the personal gain she realized through trading:

> When I sell, the money lets me do whatever I want to do. My intentions are fulfilled when I sell. This brings independence because I have opportunities with money for myself…The work that I do gives me joy, it is more exciting when it's going on progressively. I get the edge that pushes me to get up early from the house and come to the market and sell.

Stella synthesizes the connection between economic control, independence and empowerment:

> The market is highly important for me because everything done comes from the money made in the market. Progress is from business and that is encouragement, pleasure in doing, moving forward, and improving.

Figure 4. Madina market woman selling fish in Accra, Ghana. (Photo by Jennifer Reddy)

When cash is acquired and bills are paid, Madina traders gain self-confidence in being able to provide and secure opportunities of their children. Sen (1999) describes non-income variables (i.e. Madina market women's feelings of satisfaction) as factors that have reason to be valued. Feelings of independence and empowerment that are not explicitly linked to the economic gains are realized as traders successfully satisfy practical gender needs with cash acquired through the productive role of trading. Earning is paramount to a market woman's practical gender needs, but also her strategic gender needs, since many of the women control their finances and seek to fulfill their own security through this process. While it is access and control over market earnings that enables a trader to take matters into her own hands, it is also imperative to recall that, for many of these women, independence and empowerment in the productive sphere is only part of the larger picture that must include the household, their larger family and community. Therefore, while beyond the scope of this paper, it must be acknowledged that it is equally important for Madina market women to secure and experience independence and empowerment in their homes and communities (in addition to the market).

SATISFYING STRATEGIC GENDER NEEDS: The Productive Role

Thus far we have come to know Madina market women as busy, successful women, using their triple role to satisfy practical gender needs. It would be simplistic to assume from this, however, that strategic gender needs would simply fall into place – this is not the case for Madina traders. For Madina market women, strategic gender needs inherently challenge economic disparity – including access to and control over credit and savings – and political inequality – including representation and accountability, ownership and control.

a) Meeting Strategic Gender Needs

Madina market women have already taken valuable steps toward identifying and addressing strategic gender needs, and, as this paper has alluded, the potential for meeting these needs can be realized through the sphere of Madina market on both economic and political levels. Traders have recognized this, mentioning the areas (detailed below) that could be further improved to satisfy strategic gender needs. This awareness illustrates the blatant nature of systemic discrimination that is experienced on a daily basis by Madina market women as they attempt to balance reproductive, productive and community management roles.

Economic Strategic Gender Needs

Economic strategic gender needs fall into four categories. Funding children's education, as the first example, is a practical need that could contribute toward meeting an economic strategic gender need. Mansah explains the situation of her educated children:

> I cannot tell [if my children will take over the market] because they are boys and are enrolled in school now. If they attain higher education, they can work in an office and probably not work in the market.

The goal for Mansah is not to have her sons work in the market; rather, she sees formal education taking precedence over trading. While the work of these sons will be personally valuable it is not exactly clear if and how the sons will support Mansah. Perhaps the higher educational attainment of Mansah's sons will enable them to care for her in the long term, into her old age. If this were the case, then Mansah's investment would fulfill a practical need, since she would have a support system in her elder years. Of course, the educational attainment of male children is problematic: for example, Mansah did not mention the fate of her youngest child, a daughter. Since Madina has a clear apprenticeship system where women educate younger female relatives, it is likely that Mansah's daughter will be educated in the trade at a young age. Similarly, Gloria works the egg stall with her mother, Stella, in order to facilitate the education of her brother at the polytechnic institute. The importance of female education has not yet been socially recognized, and women are generally allocated to market work without question. The lack of educational or future employment choice for both males and females prevents Madina traders from fully exploring the benefits of formal education and old age support from all of their children, and from allowing their daughters and female family members the opportunity to attain a full education and expanded employment opportunities.

Sophia sheds light on the trade-oriented training of females while she discusses her experience in the market from past to present. Sophia explained that her mother started the groundnut paste stall and now she has taken over since her mother is too old to come to the market. Instead, Sophia's mother stays at home where she helps with the frying of groundnuts. In this way Sophia's mother has been able to carry on her business while being supported by her daughter.

A child's education, formal or informal, is an investment that in the short-term is in the interest of the child and in the long-term can become the future security of a Madina market woman. In the long-term, investing in children's education alleviates the burden of productive work on Madina market women and thus serves an important practical gender need. It is currently problematic, however, that the choices for formal and informal education are not offered to both genders equally, since working toward the education of both sons and daughters can provide more strategic benefits to Madina market women (and their daughters) in the long run.

Second, profits provide a means to meet practical gender needs. Traders, however, referred to the need to access credit for themselves. With access to loans, women would make larger investments in their businesses, produce larger profits and thus contribute more to children's education and personal security. The ability to access loans is the ability to invest in a more stable, productive role of trade. However, Mansah shares her struggle in fulfilling this endeavour:

> I am in search of loans. I do not know where to go to get access to financial loans. My money source comes from the work that I am doing in the market.

To attempt to address the strategic need for more self-controlled cash, a trader-organized method of credit is already functioning. Mansah explains the system: "When I have no money I use credit […] I buy from the wholesalers who give produce on credit and then I go back and pay them and keep the profit." This form of credit is representative of a Madina market woman's ability to stretch her productive capacities. This ability increases the capacity of Madina market women to meet economic strategic gender needs. It is important for traders to be able to obtain produce without first having cash on hand. Without this system of obtaining produce credit, traders would face lost selling opportunities, and thus lost productive capacity within the market. The benefit of having cash (in addition to vegetables) on loan, however, is found in the fact that cash can be used to purchase tables, baskets, produce, transportation, children's education and childcare, among other goods and services.

A final example of an economic strategic gender need of Madina market women is that of savings. More savings increase the chances for long-term financial control and independence. Income from trading is not substantial; therefore, saving income is difficult as it gets used to cover women's monthly expenses. Traders who do save on a monthly basis do so through a local system called the Susu. The Susu collectors are based beside the main Madina market area, in an 8-foot-high, 3-foot-wide wooden plank building with a window, and deploy collectors to run rounds through the market at the end of each trading day (Abigail). Abigail explains the Susu system:

> You can give him [Susu collector] ten, twenty or five thousand [cedi] to keep for the whole month and they take the profit from one day. And so you have a bulk amount of money at the end of the month…The 10,000 everyday adds up and so you might get about 200 or 300 thousand at the end of the month...

This system of saving begins to address a Madina market woman's economic strategic gender need in two ways. First, the Susu enables a trader to put cash away for a short period of time, allowing for women to collect a lump sum (200,000-300,000 cedi) at the end of each month (Abigail). This sum could be used to pay bills or as Abigail suggests, "it can be saved in the bank, a normal bank, since it will be a lump sum." An accumulation of savings could be used by traders for personal business development, childcare, or investments in housing, among other goods and services. This can potentially be used strategically to shift power dynamics within the home and the women's communities, altering women's position and possible subjugation within these spheres. Second, the Susu provides a reliable and safe place for traders to put their cash funds. It is imperative that Madina market women have a dependable place to store funds, since not all expenses are immediate: rent and school fees, for example. In addition, if women are able to securely save trading profits, they may be more willing and able to use savings for formal education of female children, directly pursuing another strategic gender need. Perhaps the availability of funds in this way will encourage traders to 'save up' for investments in children's education, thus reaching old-age security and shifting gender dynamics in education processes. In these respects, the local Susu system could prove to be a valuable means to meet economic strategic gender needs of Madina market women.

Overall, the market social network has the potential to contribute to economic strategic gender needs, since it is through this network that women can (and do) organize themselves to access personal forms of credit and savings. Both arrangements are informal and created by traders for traders. The venue of Madina Market proves to encourage women to not only acquire cash, but also find means to access credit and savings, thus increasing financial stability and security. By expanding their productive capacities, Madina market women therefore also increase their economic independence and can begin to satisfy their economic strategic gender needs.

Political Strategic Gender Needs

Madina market women made reference only to formal politics in their interviews,[7] seeing them sometimes as a benign force, but more often as a negative presence in the market's existence. Nana Ama presents no direct issues with local government. She explains, "I don't want to stand for a position as a candidate, or get actively involved in campaigning, but I do exercise my right to vote." Mansah feels uninterested in politics because she is unsure about whether politicians will hold to campaign promises once they win power. In addition, she shares:

> I do not partake in politics, I do not vote…I am not interested in whether they come to the market or not, my mind is on my job…I don't get myself involved in such things.

Sophia reinforces why these thoughts on formal political participation exist when she says, "We [market women] receive sweet promises in their [politicians'] visits to the market…they receive their position and do nothing!" Formal politics appeared to have a less than favourable reputation with many of the Madina market women, which may contribute to their reasons for not wanting to get more formally involved.

It was nonetheless obvious through participant observation that complex informal politics were at play in the market. However, due to the lack of information provided directly by traders, it is difficult to deduce exactly what (or how extensive) these informal politics are. Importantly, it should be noted that elderly females dominate the market sphere from all perspectives. Not only do these women control who enters the market, but they also control the style of trading that prevails. Trading knowledge is held by elder females and passed to younger females joining the market, usually by working side by side in the market.

Claudia Milne (1983), in her research on Kumasi market (in central Ghana) explains that some elder women, either through lineage or appointment, are granted the title of Queen Mother. A Queen Mother in the

7 Informal politics also appeared to be a subtle yet significant part of market life the dynamics, however, were not directly discussed by the interviewees.

market is separate from that of a Queen Mother in wholesale (Ruby).[8] Ruby, as a wholesale Queen Mother, responds to the concerns of her community members that are not directly linked to her production. A market Queen Mother, however, responds to the concerns of traders within the market (Sophia). Thus, they must be understood as separate powers. Stella explains the role of the Queen Mother in the market: "The Queen Mother fights for us, she is a leader with problems to fix." She continues, "The government affects us and the Queen Mother fights for us" (Stella). In the market, a Queen Mother is in charge of a particular section or type of good, and is called upon to fix prices and settle disputes (Milne, 1983; Sophia; Stella; Ruby). Claudia Milne (1983) explains that Queen Mothers must be responsible, respectful and must consult with elders for decision-making. The market Queen Mother would lead and investigate disputes and refer to traders for opinions in settling disputes (Milne, 1983). There was little mention of Queen Mothers at Madina Market, however, and thus it remains unclear how large their role is in this situation.

Madina Market is organized informally according to specific market days, times, items, product locations, and general order. Stalls are neatly displayed and traders are commonly cooperative and mindful of the market order. The informal political system of Madina Market appears to be functioning in such a way that business can occur without the daily external interventions of formal government. Madina market women demonstrate that when formal government does affect them (this most often happens negatively), they have an existing informal political order (through the market Queen Mother) set up to address issues.

Figure 5. Strategic gender needs addressed from within productive roles. Community management roles supporting productive roles that support reproductive roles where practical gender needs are realized.

The organization of traders can perhaps be further developed to be a powerful source from which traders can approach formal government and address issues. Political strategic gender needs are an integral component of Madina market women's roles. While it is difficult to assess how informal politics are being used beyond practical means, it is possible to note that they could be used toward the identification and satisfaction of strategic gender needs. The informal political order illustrates another way that Madina traders could further organize and represent themselves to address (formal) political strategic gender needs – first, by obtaining political representation and, second, through garnering ownership of Madina Market trading space.

For traders, the satisfaction of practical gender needs is necessary, but, importantly, is not sufficient for meeting strategic gender needs. As discussed above, however, there are subtle ways in which Madina market women are expanding their opportunities to work toward identifying and meeting strategic gender needs. These expansions, however, are limited in that traders are not fully able to unfold the ability to meet the strategic gender needs that have been mentioned (for various reasons, which are discussed below).

Madina Market, as a social venue, bridges practical and strategic needs in such a way that both needs are intimately connected. Practically, however, this transition requires the identification of strategic gender needs and the means available and needed to achieve them. The social venue of Madina Market has potential to serve both purposes. It has been illustrated that the triple role is diligently managed by traders to satisfy practical gender needs that stem from the reproductive role. Strategic gender needs, on the other hand, can begin to be identified and addressed through the means offered in their productive role at the market.

Traders illustrate that they informally address economic and political issues while staying just below the surface of the larger universe of formal economics and politics. Madina market women function within their social network not only to get the job done, but also to increase economic security and political organization. There are, however, areas that are left un-addressed. While economic independence in terms of cash acquisition and control appears to be an immediate strategic gender need identified by Madina market women, full control,

8 There are several Queen Mothers at the wholesale level who produce and sell produce to retail-level market traders. Similarly, there are several Queen Mothers at the market level who look after certain goods. While this is more obvious in larger markets, Madina did have area-specific Queen Mothers (Sophia). Both types of Queen Mother deal with governmental disputes: wholesalers deal with municipal-level disputes while traders deal with market-level disputes (Ruby).

political representation, acknowledgement and ownership of the market remain to be challenged.

CONCLUSIONS & RECOMMENDATIONS

a) Further Addressing Economic Strategic Gender Needs

Access to and Use of Cash Credit

While Mansah explains how she accesses credit in the form of produce, she is aware that credit in the form of cash would be even more valuable. Obtaining "produce credit" is a plausible first step to entrepreneurship; however, there are certain limitations to this. With the access to a mobile, flexible form of credit – where one can borrow cash – a woman could decide if and how much to invest in produce stock, transportation, display and storage, among other things. The flexibility desired in credit may only be realized through a highly liquid asset such as cash. Produce credit, while readily accessible to Madina market women through their networks, is simply not as efficient as it could be if its form were more flexible.

The question remains – why don't Madina market women take out cash loans? Mansah explained that she didn't know where or how to access cash credit. She seemed to be unaware of (or, perhaps, unsure of how to access?) the Women's World Banking network set up about 50 feet behind her stall in Madina market. Access to cash may be more straightforward than one might initially think; however, it may be a matter of building awareness of the opportunities and choices that are available: what those networks do, how to access and use them and the risks involved in such endeavours.

The acquisition of cash can aid traders in satisfying a variety of practical and strategic needs. Cash – as a flexible and liquid medium of exchange – can provide Madina market women with economic independence, an increased sense of self-worth and empowerment. While the use of cash presents itself with opportunities, it is evident for Madina market women that this use still exists in its infancy, with many potential avenues of improvement. In any case, the marketplace can be understood as the venue from which Madina market women may operate to immediately satisfy some economic strategic gender needs in addition to practical gender needs.

Madina market women illustrate that trading provides cash that fulfills practical needs: food, shelter, books and school fees. Practical gender needs, once satisfied, prove to be a valuable step toward identifying and meeting strategic gender needs. While these needs are often for the long-term future of their children, they can further reveal the strategic gender need of elder-age security for a market woman.

The practical need of education fails to completely unfold toward a strategic gender need, however, since some traders account only for the educational attainment of their sons. Traders could value the alternatives offered with education for both sons and daughters, thus addressing the generational gendered work cycle on a strategic level. In addition, the elder-age security for a trader would increase (more children would be educated and hopefully working at higher-paying jobs) and could thus become a strategic achievement. While it may be initially difficult and seem risky for the women to start sending their daughters to school (instead of training them to earn an immediate income like them), the ability for women to get access to credit and financing in order to build their businesses and income can allow them more security in taking this risk.

In the face of economic hardship, many women adapt their gender roles and take on economic independence as primary income-earners of their households. As their demands and gender roles change, so do their opportunities in addressing strategic needs. The ability to take on and satisfy modern roles encourages women to use trading as a viable strategy to support their families and themselves. In this process, these traders, as products of change, continue to contribute significantly to socioeconomic transition – and gain independence through economic self-sufficiency. Madina market women are far from merely complementary or supplementary income-earners of their households.

Expansion of Savings Services

Currently some Madina market women participate in Susu savings. Having long-term savings would help women to not only meet their short-term monthly needs, but perhaps longer term needs as well: investment in future development of children's education, personal business development and housing, among other needs. Access to savings is important for traders since it is through savings that women may more securely plan and provide for their families and for themselves.

Expanding savings services for women could happen in two ways. First, the Susu is not a long-term savings service for traders, and perhaps traders do not have the financial means to save for the long term. If the Susu were expanded to offer incentives such as interest payments, traders may be more willing to save

money for a longer period. The Susu might not have the ability to expand in such a way, however, since it is basically looked upon as a storage space for trader profits. In this case, the Women's World Bank – as an alternate option – may have a space to develop and help traders save their funds, provide interest and long-term saving opportunities. This would be a leap forward for Madina market women, since access to long-term savings with interest would allow them to participate further in the formal economy and reward their productive work by helping them save, gain interest and invest seriously in their businesses and children's education, including female children.

The barriers to accessing or demanding these services are somewhat unclear. Perhaps it is simply the informal stigma that surrounds the work of Madina market women. This stigma can be connected with the carelessness of government tax collection and their disinterest in providing services for the women. Since the government fails to treat Madina market women fairly, it becomes easy to devalue and thus stigmatize their trade at a political level and, perhaps, at a social level.

Effectively, this challenges any direct movement, good or bad, into the formal economy. Because traders are stereotyped as uneducated, illiterate and therefore not a valuable part of the economy, they may not be included in formal efforts to support savings and investment. Additionally, if these social stigmas were challenged within the various roles and environments these traders encounter (i.e. through the work of non-governmental or community-based organizations) they may better be able to represent themselves and address their strategic needs.

b) Further Addressing Political Strategic Gender Needs

Formal Political Recognition

It is apparent that beyond economic strategic gender needs, traders have political strategic gender needs that require significant development. It appears that formal politics have little place in the lives of traders. Nonetheless, involvement in formal politics stands to be an avenue that traders could use in identifying and addressing strategic needs. The current situation, however, would have to change drastically: the relationship between women and local government is not a particularly good one.[9] This contributes to the unstable nature of trade in Madina market, since conducting business in this environment is neither guaranteed nor secure. Nana Ama explains, "sometimes they [security] come[s] to drive the market women away, chasing us out of the area." Illustrating the corrupt nature of security in Madina market, Nana Ama explained that she leaves all her produce at the market overnight, because "…you can pay extra to have someone tipped, to pay extra attention to your goods specifically." Certainly such services should be a part of collecting taxes from traders for using this area. Abigail explained that traders pay monthly taxes and levies (rent) to the government. Fees that are already collected should go toward cleaning up the market, sanitation facilities, security, and general maintenance. However, this is currently not the case: Madina market is not granted 'legal' status, despite the fees paid. Sophia explains that receipts are allotted for taxes and levies, but not for garbage fees. This is problematic, since traders believe that the government does not recognize the total monetary contributions made by Madina market women (Sophia; Abigail; Nana Ama).

The local government keeps Madina market on an unsteady playing field, threatening closure and sometimes chasing traders out of their market space. Market women provided no direct answer for this treatment, but were clearly frustrated with the status of Madina market.

Encouraging Governmental Action

As a solution, Sophia explains that if trading accounts were made public, politicians and the community alike would be aware of how much trading contributes to the larger society of Accra. This could help build a link between traders and politicians, showing the potential gain that could be realized by both sides. In addition to providing accountability and receipts for all monetary collections, public awareness would acknowledge the work of traders and their monetary contributions to the economy. This could also meet sanitation needs within the market in order to keep women safe and healthy while trading. Formal inclusion could help to legitimize trading as a large, serious and important business. Traders, too, would have information on their own accounts, be able to keep track of market participation and build connections (and possibly empowerment) in this way. Providing a semi-professional network to include women in the formal public sphere would help to address a political strategic gender need of acknowledging and legitimizing representation. The current ability of Madina

9 Market Queen Mothers may be a viable source to organize traders for decision-making at the formal political level. This could take a similar form as elder consultation where Queen Mothers help to organize and voice concerns of local governments in order to receive feedback from traders and relay the concerns to the government.

market women to organize themselves is probably the most valuable means through which formal politics can be approached. Perhaps through working with local non-governmental organizations, local government could be pushed to focus on providing receipts and services to traders, and publicizing trading accounts: this would not only encourage others to see traders as important participants in economic and political spheres, but it would encourage the larger society to perceive traders as they perceive themselves.[10]

c) Looking Back on the Potential of Madina Market as a Social Venue

On the surface, it appears that Madina market women have started their careers in trading as an extension of their reproductive duties concerning food security and nutrition, and as taking up a socially acceptable occupation for an illiterate woman. Market women, however, illustrate greater achievements beneath this simple exterior. Market participation has been manipulated and transformed by these women to successfully and independently satisfy practical gender needs.

The informal market of Madina houses a group of hard-working, strong women trading day in and day out to provide for their families. Trading has transpired and evolved to be used by women to feed and educate children. Trading also begins to provide personal security, namely through economic independence and informal political organization for Madina traders. In order to harness the means to obtain economic independence and formal political organization, Madina market women must maintain a strong social interdependence with one another.

Madina market women show significant success and further potential in utilizing the marketplace as a social venue to meet practical and strategic gender needs. Women find the market to be a key place to gain economic independence and self-worth, catch up on issues and events, share stories of success and failure, learn techniques for both productive and reproductive work, and become a greater part of the community. It is obvious that the marketplace is not only a place of business, but a place of social interaction concerning

Figure 6. Madina market women in Accra, Ghana. (Photo by Jennifer Reddy)

business and everything that surrounds it.

As Kabeer (1998) alludes, the question is not if the market empowers women traders or not; rather, it is an analysis of how market participation is an aspect of empowerment as a context-specific, multifaceted

10 While it is recognized that the accounting and legal inclusion of market trade could result in barriers to trading through increased taxation, it must also be considered that traders are classified neither as completely formal nor informal. Since traders already contribute taxes and levies in a completely formal way, it is perhaps the obvious next step to engage formal services from the government. Meeting the basic formal needs of traders in terms of providing those services that correspond with current tax payments is a first (and possibly only) step required in formalization.

process of change. Through a qualitative approach, this study has enabled the evaluation of women's context-specific experiences with the triple gender role. Madina market women have successfully fed, clothed, and housed their children and families, and secured their lives while working hard to preserve the pride and empowerment that envelopes the work of a market woman. Many Madina market women are experiencing pride and empowerment in contributing to their households in economic ways, assisting family members in fulfilling their productive duties such as education and employment, controlling their cash earnings, raising their children for better opportunities and choices all by working for themselves, using market trade as the avenue for entrepreneurial endeavours.

Many Madina traders have used their diversified gender roles to contribute to their households and thus limit their dependency on other sources of income. Kabeer (1998) explains this as a "valued transformation" on the terms of work, rather than a simple increase of the triple gender burden (p.67). Keeping in mind that empowerment is multidimensional, it is important to apply a more inclusive perspective of empowerment for the case of Madina market women as a particular group in a particular time. Kabeer (1998) defines this perspective as an "expansion in the range of potential choices available to women" (p.68). With this understanding it becomes important to consider and include the experiences of Madina traders as important routes toward empowerment. While the market may not be a sufficient venue from within which Madina traders can and will recognize 'empowerment' in its entirety, it is, nonetheless, one route through which some empowerment can be experienced.

Madina market women have collectively built a place of independence and empowerment for themselves by beginning to secure finances and contribute to the well-being of their children and families. Madina traders, on their journey toward independence, are experiencing self-confidence and pride in their contributions. Throughout this journey, traders empower themselves and each other with their achievements. As the market evolves, we find that women are identifying and finding ways to address strategic gender needs. As Madina market women adapt to and educate themselves within this system, their potential for organization towards strategic gender needs will also adapt and grow.

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APPENDIX

1 During your life in Ghana, how have you been involved with the market, in what depth and to what extent?

2 How does your role at the market affect your domestic and/or reproductive role?

3 How did you get involved with this market?

4 How do you see your participation in the market as a special or important role?

5 How does your knowledge of the market compare to that of other market women or other women or men?

6 How is your market participation accredited/acknowledged/appreciated in the political sphere, economic sphere and social sphere?

7 Why is the market important to you as a market woman, as a woman, as a Ghanaian and as an African?

DR-CAFTA and the Future of Maize Farming in Central America: "Betting the farm to align with the United States"[1]

Dave Campanella

ABSTRACT – *This paper offers a critical analysis of the Dominican Republic-Central America-United States Free Trade Agreement (DR-CAFTA), with a central focus on maize. Now ratified by all participants, DR-CAFTA will have a major impact in Central America. The paper details three specific categories of impact: the dumping of under-priced American maize, the spreading of GMOs, and the general exacerbating of impoverished condition as realized by Mexican maize farmers under the North American Free Trade Agreement. The paper concludes that DR-CAFTA is the continuation of American domination of Central America, and that the hopes of the peoples of Central America largely lie in the results of the Doha negotiations of the World Trade Organization.*

RÉSUMÉ – *Cet article offre une analyse détaillée de l'accord de libre-échange entre la République Dominicaine, LÁmérique Centrale et les États-Unis (DR-CAFTA), avec un foyer central sur le maïs. Maintenant ratifié par tous les participants, DR-CAFTA aura un impact important en Amérique Centrale. La rédaction examine trois catégories spécifiques d'impact : vider le maïs américain sous-évalué, la propagation des GMO, et l'exacerbation générale de l'état appauvri réalisé par des fermiers de maïs mexicains par rapport aux termes de l'accord de libre-échange en Américain du Nord. La rédaction conclut que DR-CAFTA est la suite de la domination américaine de l'Amérique Centrale, et que les espoirs des peuples de l'Amérique Centrale dépendent surtout sur les résultats des négociations de Doha de l'Organisation de mondiale du commerce.*

INTRODUCTION

Maize plays an integral role in the lives of the peoples of Central America.[2] It is grown by many of the small farmers that dot the countryside, and is an important component of the diets, cultural symbolisms and livelihoods of many of the people that have lived there for millennia. However, the influence of the United States (US) is set to drastically change this aspect of Central American life through the implementation of the US-Dominican Republic-Central America Free Trade Agreement (DR-CAFTA), which includes the Southern countries of Costa Rica, El Salvador, Guatemala, Honduras, Nicaragua, and the Dominican Republic.

The US has a long history of involvement in the agriculture of Central America, from its control of coffee and banana plantations in the nineteenth century to modern day economic initiatives such as DR-CAFTA (Fraser, 1987). As this paper will argue – through an analysis of some of the agricultural components of DR-CAFTA – US economic interests in the region remain the same today as they did a century ago: manipulating Central American agricultural production to match US interests. US-based multinational biotechnology companies have high stakes in the continuing development of new markets for their products. I argue that DR-CAFTA is structured to secure additional export markets for US maize and other food products, as well as to elevate the

1 Dick Cheney's remark regarding DR-CAFTA during a radio interview with Scott Hennen, WDAY 970 AM on 30 June 2005.
2 For simplicity, this essay will refer to the six countries in the DR-CAFTA agreement as "Central America," which does not include the Central American countries of Belize and Panama.

role of genetically modified organisms (GMO)[3] in global food production.

With the continued inability of the current round of World Trade Organization (WTO) negotiations to reach a formative conclusion on agricultural issues, the US has focused its efforts away from the multilateral arena of the WTO to bilateral and regional trade agreements (Tansey, 2002). Since 2000, the US has actively pursued Free Trade Agreements (FTAs) with Chile, Peru, Singapore, Thailand, Malaysia, Taiwan, Colombia, Ecuador, Korea and United Arab Emirates, as well as with the southern African countries of Botswana, Lesotho, Namibia, South Africa, and Swaziland (bilaterals.org, 2006). On August 5, 2004, trade ministers from Costa Rica, the Dominican Republic, El Salvador, Guatemala, Honduras, Nicaragua, and the United States signed DR-CAFTA. The agreement has now been ratified in every country, the last of which was Costa Rica, who concluded the legislative approval process with a national referendum in October 2007 (Sice- Foreign Trade Information System, 2007).

As with similar FTAs that include countries from both the Global North and from the Global South, a disparity in economic power meant unequal bargaining power during the negotiations (Oxfam, 2005). The US was able to ensure that it could freely export its maize without having to reduce its high sugar tariffs, even though sugar is grown extensively in Central America. In addition, DR-CAFTA set a precedent for trade agreements by including the obligation for signatories to recognize the strict intellectual property rights (IPRs) outlined by the International Union for the Protection of New Varieties of Plants in their Convention of 1991 (UPOV-91). As the US' genetically modified (GM) maize spreads into Central America, UPOV-91 will give US corporations additional control over the Central American food supply.[4] The position of Central America is similar to that of Mexico under the North American Free Trade Agreement (NAFTA) – an FTA whose impact on Mexican farmers serves as a telling example of some possible repercussions that Central American farmers are likely to encounter.

However, it should be noted that signing DR-CAFTA was not simply a collective error of judgment by the Central American political leaders. The FTA will certainly benefit certain special interests and selected sectors of the economy, and pressure from these potential beneficiaries may have led to the signing of DR-CAFTA. As this paper will aim to highlight, however, the maize farmers – who make up a large part of the populations – will certainly lose.

DUMPING, EXEMPTIONS, AND DOMINATION OF THE NEGOTIATIONS BY THE US

The US economy dominates those of the Western Hemisphere, accounting for nearly 70 percent of the region's GDP, while the total income of the US agribusiness companies Cargill and Archer Daniels Midlands are greater than the combined GDPs of all of Central America (Ricker, 2004). This huge disparity of economic power allowed the US to shape DR-CAFTA to its benefit. One illustration of this bias is the US' ability to continue exporting subsidized and under-priced maize into Central America.

Maize is the most widely planted and valuable crop grown in the US, and much more is grown than consumed within its borders (Fanjul & Fraser, 2003). As of 2003, the US accounted for nearly 70 percent of all maize exports, shipping approximately 50 million metric tonnes (Fanjul & Fraser, 2003; United States Department of Agriculture, 2007). Current domestic subsidies in the US promote an agricultural production system that artificially keeps prices low. In 2003, the US provided roughly $40 billion in domestic support to all agricultural sectors (Oxfam, 2005), of which more than half went to the largest 5 percent of farms (Mesa Global, 2005). Of all the farming sectors, maize receives the largest share of these subsidies, with payments to producers totalling $10.1 billion in 2000 (Fanjul & Fraser, 2003).

The 1994 Agreement on Agriculture (AoA), as part of the Uruguay Round, contained a framework of rules to regulate international trade in agriculture. The AoA, although stating commitments to "provide

3 A GMO is an organism that has had its genes manipulated through the addition of DNA molecules from other sources using genetic engineering (Warwick & Meziani, 2002). Controversy exists mainly over the production and consumption of GMOs; for example: should modern science be used to create new forms of organisms? When released into nature, how will GMOs affect non-genetically modified organisms? Should precautionary principles be used in governing GMOs? It must be noted that the large majority of genetically modified crops are grown in the US, and only a few companies grow these crops, with one American company, Monsanto, accounting for the lion's share (Warwick & Meziani, 2002). The US, therefore, has a vested interest in seeing increased use of GMOs around the globe.

4 IPRs bestow private ownership over inventions, excluding others from using the invention without permission, and can come in the form of a patent, trade secret, trademark, or copyright. UPOV-91 is one example of a multilateral regulatory framework to govern the use of IPRs. Much controversy exists over biotechnology and IPRs because GMOs are considered inventions. Thus, they can be (and are) privately controlled through the application of IPRs. Therefore, potential exists for control over the food supply to be in the hands of a small number of private companies.

for substantial progressive reductions in agricultural support," contained loopholes that actually allowed countries' subsidies to increase (Clapp, 2006a, 2006b; Messerlin, 2005; Oxfam, 2005). With the enormous wealth disparity between the Global North and South, the level of subsidies in the North far exceeds those given in South. Intense renegotiation of these policies is underway in the Doha Round; however, without a conclusion the US has continued unabated in its use of domestic support (Clapp, 2006a). As such, DR-CAFTA contains no concessions by the US to lower its level of domestic support. Not addressing US agricultural subsidies in the content of DR-CAFTA will, without an alternate conclusion from the WTO negotiations, solidify the ability of the US to export maize into Central America below the cost of production.

One result of these agricultural subsidies is that the price of maize in the US has depreciated below the actual cost of its production. In 2001, the price of US maize averaged 33 percent below full production costs (Ricker, 2004). A study by the Institute for Agriculture and Trade Policy showed that from 1990 to 2001, the export price of US maize varied between 25 and 30 percent below the full cost of production (Trans Atlantic Consumer Dialogue, 2003). Conversely, even though 90 percent of the world's farmers live in countries of the Global South, their total aggregated support is less than 5 percent of that given by the US and the European Union (EU) combined (Oxfam, 2005). Under the framework of DR-CAFTA, Central American farmers are forced to unfairly compete with American farmers not simply on the basis of cost-efficiency, but also against the level of support given by the respective governments. Domestic support for farmers is central to US agricultural policy, and its continuation allows maize to be exported for less than the true cost of production (Fanjul & Fraser, 2003; Galian, 2004).

If the importing country's industry cannot match the US' artificially low price, the market could be flooded with the cheap imports. Agricultural production in Central America is largely based on numerous small-scale, mostly self-sufficient farmers (Olson, 2004). Based on cost-effectiveness, they simply cannot compete with the huge, subsidized, monoculture farms in the US. An increase in imported maize priced under the cost of production could bankrupt local farmers in Central America by undercutting them and forcing the price down to an unsustainable level (Oxfam, 2005).

The governing rules of the General Agreement on Tariffs and Trade (GATT) and the WTO, of which all DR-CAFTA signatories are members, specifically prohibit the act of dumping. Dumping is defined in Article IV, point 1 of GATT as the sale of a product to another country for less than "normal value," which is foremost determined as the domestic selling price (World Trade Organization [WTO], 2007). Since US maize is sold domestically below the cost of production, however, there are no infringements of the WTO anti-dumping clause when this maize is then sold internationally at these prices. This is despite the fact that GATT explicitly recognizes that a product's price should account for not only the cost of production, but also for profit and selling costs (WTO, 2007; Monge-Gonzalez & Monge-Arino, 2006). However, the GATT's definition of price that includes the full cost of production is subordinate to the GATT's definition of price as the domestic selling price[5]. The text of DR-CAFTA recognizes the GATT's ruling on price, meaning the US can continue to sell its maize internationally below the cost of production because it also does so domestically (Sice - Foreign Trade Information System, 2006).

Even if the WTO's definition of dumping more accurately defined the systemic underselling that is occurring in the US, there are additional barriers to Central America being able to successfully defend its borders. The enforcement of anti-dumping policies is extremely political, as attempts are often viewed as having protectionist motives (Fanjul & Fraser, 2003; Messerlin, 2005). Mexico attempted to impose anti-dumping measures against the US for its trade policies on rice and beef and subsequently faced a backlash from the US[6] (Fanjul & Fraser, 2003). As well, the regulating bodies overseeing claims of dumping in Central America often lack sufficient finances, staff, and knowledge (Monge-Gonzalez & Monge-Arino, 2006). This deficiency of resources may explain why the six anti-dumping petitions launched in Costa Rica resulted in only one affirmative case; however, before the investigation could be completed, the business in question

5 The following is an excerpt from Article IV, point 1, of GATT:
"For the purposes of this Article, a product is to be considered as being introduced into the commerce of an importing country at less than its normal value, if the price of the product exported from one country to another
(a) is less than the comparable price, in the ordinary course of trade, for the like product when destined for consumption in the exporting country, or,
(b) in the absence of such domestic price, is less than either
(i) the highest comparable price for the like product for export to any third country in the ordinary course of trade, or
(ii) the cost of production of the product in the country of origin plus a reasonable addition for selling cost and profit." (WTO, 2007)

6 Specifically, the US brought an official complaint against Mexico in the WTO.

had reduced its shipments to practically zero, likely in order to avoid reparations (Monge-Gonzalez & Monge-Arino, 2006). Overall, there would appear to be a lack of comprehensive rules, political ability, and resources for countries of the Global South (such as those involved in DR-CAFTA) to be able to effectively prohibit the dumping of maize across their borders.

Although some Central American signatories were allowed to exempt white maize from tariff elimination and provisions were included in DR-CAFTA to recognize 'sensitive agricultural commodities' (SACs), neither concession by the US substantially furthers the interests of Central America. Two types of maize grown in the US and Central America are white maize and yellow maize. Although some Central American countries will be able to keep their white maize tariffs in place, white maize comprises only 1.2 percent of US maize production (Galian, 2004). Most US maize is in fact yellow maize, and Central American tariffs on yellow maize are set for elimination. If Central American markets are flooded with American yellow maize, consumers will likely substitute their white maize consumption with the cheaper yellow maize, as occurred in post-NAFTA Mexico (Galian, 2004). Essentially, this would make the exemption of white maize tariffs meaningless, as white maize markets would still be negatively impacted by the removal of the yellow maize tariffs.

Meanwhile, the US placed 47 of its sugar and sugar substitute products under exemption of zero-tariff requirements while requiring the Central American signatories to eliminate their sugar tariffs (Mesa Global, 2005; Office of the United States Trade Representative, 2005). But sugar is the main good in which Central American countries possess a comparative advantage, meaning they have lower costs of production and thus have the potential to significantly increase their market share if allowed to trade freely with the American market (Galian, 2004). Nonetheless, the US was able to simultaneously negotiate the elimination of its tariffs on a product that Central American countries would benefit from exporting (sugar), while negotiating for Central American countries to eliminate their tariffs on a product the US had strong interests in exporting (maize). This way, the negative consequences of DR-CAFTA for American farmers would be minimized and the potential benefits maximized, albeit at the expense of the interests of farmers in Central America.

Including agricultural products in an FTA has always been extremely controversial. The initial position of the Central American governments was a complete refusal to lower the tariffs on certain agricultural products, wanting the US to first agree to lower its domestic subsidies (Ricker, 2004). The US rejected this proposal, but allowed for the tariffs on some Central American products to be gradually reduced instead of immediately repealing them outright. These products are categorized as "sensitive agricultural commodities," and include beans, rice, sugar, beef, pork, poultry meat, milk and other dairy products, and white maize (Jaramillo et al., 2006). Nevertheless, Chapter 19 of DR-CAFTA allows the Free Trade Commission - comprised of senior bureaucrats from each country - to accelerate the tariff elimination at its discretion (Tripartite Committee, 2005). In Mexico's experience with NAFTA, the phase-out of tariffs on maize, initially negotiated to take 15 years, were accelerated to less than 3 years (Fanjul & Fraser, 2003). Regardless of the timeline on tariff elimination, the drastically low price of American maize means Central American maize farmers will be impacted long before the end of the phase-out period is reached (Ricker, 2004). In the end, these countries will have sacrificed the ability to raise tariffs, their main source of protection from US domestic subsidies and unfair export prices.

INTELLECTUAL PROPERTY RIGHTS AND GENETICALLY MODIFIED ORGANISMS

DR-CAFTA also advances another objective vital to the US biotechnology sector: to promote the cultivation of GM crops worldwide, which will expand US multinational corporations' market access into global food systems and increase their control of the global food supply. The US is the largest producer of biotechnology, growing nearly 70 percent of the world's GM crops (GRAIN, 2005). There has been popular resistance to the technology, particularly from the EU, who placed a moratorium on GMOs from 2000 to 2005 and has since established strict regulations on GMOs. In 2002, several southern African countries refused food aid shipments of maize from the US because of concerns over the inclusion of GM varieties (Zerbe, 2004).

Although the US has previously attempted to segregate many of its GM crops, recent cases have shown an inability or lack of desire by the US to prevent these crops from contaminating non-GM strains. Approximately 14 percent of US maize is currently genetically modified (Clapp, 2006b). Transgenic DNA originating from the US has been found in unsanctioned domestic fields in Mexico, and even in Central America (Clapp, 2006c). One example, the Starlink case, revealed the ineffectiveness of US regulations concerning GMOs. The Environmental Protection Agency (EPA) deemed the Starlink brand of maize safe only for consumption by animals and not humans; nonetheless, the maize was soon found throughout the human food supply in the US and abroad (Clapp, 2006c; Taylor & Tick, 2001). Another infamous case of uncontrolled GMO release was that

of Bt10 maize. Not approved for any type of use in any country (including the US), it was discovered that for four years the maize had unknowingly been supplied domestically as seed in the US, and was also detected in shipments to Japan and Ireland (Clapp, 2006c). GM contamination of maize was also recently discovered in Mexico, even though the domestic growing of GM maize had been banned since 1998 (Vidal, 2001). But this ban does not apply to imports, and Mexico currently imports over 5 million tons of US maize (Fanjul & Fraser, 2003). It is these imports that are thought to be the likely source of contamination, since roughly 30 percent of this maize is GM (Clapp, 2006c). Twenty-two communities known for their diverse varieties of native maize were tested and thirteen showed levels of transgenic DNA in their maize (Vidal, 2001). It is further believed that contamination will continue to spread to other varieties and relatives through pollen flow (Vidal, 2001). In Central America, an independent study in 2005 found transgenic DNA in samples of maize and soy taken from Nicaragua, Honduras, El Salvador, Guatemala, Costa Rica, and the Dominican Republic: every country a member of DR-CAFTA (Clapp, 2006c). Again, the likely source of contamination was determined to be the unsanctioned import or accidental spread of GM crops from the US (Clapp, 2006c).

In the first year of the implementation of DR-CAFTA, the agreement eliminates all tariffs on imports of US yellow maize up to 1 million tons in every country except for Costa Rica, where the tariffs will be eliminated outright and thus imports will likely be much higher (Galian, 2004). For Nicaragua, this is over ten times the amount of tariff-free US yellow maize allowed into the country prior to DR-CAFTA (Galian, 2004). With increased levels of American maize crossing into the borders of these countries, the risk of unknowingly receiving GM strains of crops is elevated. The contamination of non-GM crops with these strains can then spread throughout the ancient biodiversity of Central America through pollen flow and other uncontrolled releases.

The only international agreement regulating the trade of GMOs is the Cartagena Protocol on Biosafety (CPB). It recognizes the right for importing countries to use the Precautionary Principle to ensure that they have the ability to assess the potential environmental and health risks of an import before approving the transaction (Falkner & Gupta, 2004). The CPB attempts to strengthen its member countries' capacity to regulate the currently uncontrolled entry of GMOs into their borders and would place the responsibility on the exporter to provide information regarding any possible GM content in their shipments (Falkner & Gupta, 2004). Every Central American country of DR-CAFTA has ratified the CPB except Costa Rica (*Signatures*, n.d.). However, the US and other major exporters of GMOs, such as Argentina, have not ratified the CPB (Cartagena Protocol on Biosafety, 2008). Since the cooperation of exporting countries is vital in ensuring honest accounting of the presence of GMOs, their absence from the CPB places its future legitimacy at risk. There is little that Central American countries can do to protect their borders from an infiltration of unlabelled GMOs, since the cost of testing the contents of each shipment is prohibitively high, the process would take so long as to severely impede the flow of good, and any discretionary rejection of GM crops or an outright ban would likely be challenged through the WTO as 'unfair trading policies.' Without the US backing the CPB, unlabelled, unapproved shipments of GMOs into Central America will continue (and probably increase) with DR-CAFTA.

The spread of GMOs and the influx of cheap maize will not go unnoticed by the peoples of Central America – they will encounter serious short- and long-term effects. Legal recognition of agricultural patents awarded through DR-CAFTA will give the large US agribusiness firms that own the patents the ability to exert major control over international markets. Patents already exist on varieties of basic crops that are grown in Central America, including maize, rice, wheat, soybean, and sorghum (Cervantes, 2004). The majority of these patents are owned by only six multinational corporations, three of which are based in the US[7] (Cervantes, 2004). These corporations may seek control of a particular market, such as the GM soybean market, by collecting enough patents on key processes surrounding a product to prevent others from entering that market, or by surrounding a competitor's patent with enough of their own so as to prevent the competing patent from being commercialized (Tansey, 2002). These strategies are only practical for large corporations because of the huge amount of investment capital required, and they exclude the possibility of small Central American farmers competing at this level.

To obtain a patent under the Trade Related Aspects of Intellectual Property Rights (TRIPS)[8] agreement,

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7 If a company owns the rights to a crop grown on a farmer's field they are entitled to charge the farmer a fee for the use of their "invention," an additional cost that could push small farmers off the land; alternatively, the company could choose to not let the farmer use their "invention" and destroy the crop on the farmer's property.

8 TRIPS is a regulatory framework for IPRs that was approved in the Uruguay Round of trade talks under the GATT. It consists of measures that specifically protect private interests; TRIPS is the minimum level of intellectual property protection that member countries of the WTO – from both the Global North and the Global South – must recognize, including in agriculture. The agreement was originally crafted by major business interests and pushed through negotiations via governments of the Global North. Most countries of the Global South opposed the inclusion of IPRs in the GATT negotiations (Tansey, 2002).

an invention must be found to be useful, novel, and possess an inventive step that is more than a trivial modification of known processes[9]. Biotechnology has allowed for the genetic manipulation of traditional crops in order to deem them an invention and patentable. Already, there have been several cases of American companies attempting to gain monopoly rights awarded by a patent on popular crops of the South. In 1997, a Texas-based company named RiceTec was granted a US patent to control production in North America of a basmati-like variety of rice (Trade and Environment Database [TED], 2006). RiceTec was granted the right to label and export its rice under thetitle of "Basmati," which is also a specific variety of rice historically grown in certain areas of India and Pakistan (TED, 2006). The patent was granted on the basis of the rice's specific qualities of aroma, texture, and shape after cooking (TED, 2006). India was forced to launch a long and expensive legal battle against the patent in order to protect the traditional rights of its farmers, claiming that traditional basmati rice already possesses the qualities described in the patent claim (TED, 2006). Although India was eventually successful in its fight against the legitimacy of the patent, other Southern countries, such as the Central American signatories of DR-CAFTA, may not necessarily have the resources or ability to fund such extensive legal battles to protect the recognition of traditional crops under the law.

In the case of the "Enola" bean, an American company was granted patent rights on a yellow-coloured variety of bean that had been developed over generations of breeding by farmers in Mexico (Rural Advancement Foundation International [RAFI], 2005). The company, POD-NERS, was granted the original patent in 1999 due to the Enola bean's distinct colour and because it had not previously been grown inside the US (RAFI, 2005). With the rights granted by the patent, POD-NERS began suing importers of similar yellow beans from Mexico, which damaged the export market some Mexican farmers relied upon (RAFI, 2005). Mexico brought a case against the Enola patent to the US Patent and Trademark Office; the case has still not been completely resolved (RAFI, 2005). Another case involved the awarding of a patent on the "Rojo Chiquito" bean to the Washington Agricultural Research Center and the USDA (Hang et al., 2002). The Rojo Chiquito is a brand of red bean with nearly identical properties to beans that have been grown in Central America for centuries (Ricker, 2004). Redesigned to be compatible for growing on American soil and bred with the specific purpose of being exported to Central America, the patent was granted due mainly to the addition of disease-resistant properties (Hang et al., 2002). Control over such basic staples – which often comprise the majority of poor and rural peoples' diets in Central America – raises serious concerns over food sovereignty. Of course, the issue is heightened when this control lies in the hands of only a few large, foreign corporations.

Global IPRs are governed by a number of international agreements, one of which is the TRIPS[10] agreement of the WTO. This framework is widely adopted, due to its ratification being a requirement of joining the WTO. During the negotiations of TRIPS, strong opposition from a few countries of the Global South led to the inclusion article 27.3(b), which allows for some living organisms to be exempt from patenting (Olson, 2004; Tansey, 2002). However, the implications of TRIPS have still raised international controversy, from those who think it goes too far in permitting the patenting of life to those who think it does not go far enough. It has been under review by the TRIPS Council and debates over its implications are included in the Doha round of negotiations (World Trade Organization, 2006). Many countries in the Global South have proposed alternative interpretations of TRIPS that would strictly limit the application of IPRs to living organisms (Tansey, 2002).

The role of GMOs in global agricultural production is promoted and protected by a strong international regime of IPRs; essentially, this means that the US has a vested interest in seeing such an IPR regime successfully implemented (GRAIN, 2005; Parayil, 2003). Toward this end, DR-CAFTA requires the participants to adopt the UPOV-91 agreement, which would override TRIPS and allow for patenting on plant varieties (Jaramillo et al., 2006; Olson, 2004). Concerns surrounding whether or not to recognize IPRs when dealing with plant varieties are silenced with the ratification of DR-CAFTA, which states that "any Party that does not provide patent protection for plants by the date of entry into force of this Agreement shall undertake all reasonable efforts to make such patent protection available" (Cervantes, 2004). DR-CAFTA even goes as far as locking into place any nationally recognized patent agreements by stating: "Any Party that provides patent protection for plants or animals as of, or after, the date of entry into force of this Agreement shall maintain such

9 Specifically, TRIPS states that "patents shall be available for any inventions, whether products or processes, in all fields of technology, provided that they are new, involve an inventive step and are capable of industrial application" (Tansey, 2002).

10 In a time when GM crops are spreading around the globe, TRIPS seeks to solidify a strong set of global IPRs in agriculture. For many countries in the Global South, it extends IPRs into agriculture for the first time. TRIPS – like other strong IPR agreements – will have significant direct impacts on the global food supply and agricultural practices. For instance, an emphasis on private interests over public interests could exaggerate the desperate situation of the poor, and restrict the practice of farmers freely sharing knowledge and seeds.

protection" (Cervantes, 2004). Together, these stipulations restrict the ability for Central American countries to use the TRIPS exemption on living organisms contained in article 27; the regulations also force countries to uphold the patent agreements of UPOV-91 regardless of possible Doha round outcomes that may limit the application of IPRs on plant varieties.

LEARNING FROM THE PAST – NAFTA AND MEXICO

For maize farmers, the consequences of implementing DR-CAFTA in Central America will no doubt mirror those felt in Mexico after the signing of NAFTA. Mexico is widely considered the birthplace of maize, and extensive varieties of maize are grown across the country (Eubanks, 2001). The crop is integral to the culture and the economy. Mexico's food system was organized around local production from largely self-sufficient, small-scale farmers, as is currently the case in Central America. The economic theory infused in FTAs such as DR-CAFTA states that nations should focus on producing what they can do so efficiently, and import all other products. With the help of domestic subsidies and the cost-effective gains from economies of scale, the giant monoculture farms in the US can afford to sell their crops for a cheaper price than those of other international competitors who do not receive domestic subsidies and rely on less intensive farming practices. Modern economics narrowly defines efficiency in terms of price, thus deeming US agricultural to be efficient. With the removal or reduction of tariffs, these US agribusiness companies can dominate some of the agricultural markets in Central America and depress prices to levels that force out small Central American farmers. Therefore, DR-CAFTA encourages the marginalization of small farmers in Central America, where over 5 million people depend on agriculture for a living (Ricker, 2004). This was the result in Mexico after it implemented NAFTA in 1994. Between then and 2003, the real[11] price of Mexican maize fell by more than 70 percent (Oxfam, 2005). In total, over 1.5 million Mexican farmers have lost their jobs, often meaning they also lost their land (James, 2005). Once largely self-sufficient, these farmers were forced to move to cities (or the US) in search of work, and many became urban poor.

Guatemala, the main producer of maize in Central America (Oxfam, 2005) and a signatory of DR-CAFTA, has already been negatively impacted by increased US imports. Under a liberalization movement in 1996, Guatemala lowered their tariffs and imported increased quantities of maize from the US, which led the domestic price of maize to fall in real terms by 19 percent in one month alone (Oxfam, 2005). When US maize imports increased again in 2001, farm gate prices received by domestic producers fell by more than 20 percent (Oxfam, 2005). In Guatemala alone, it is predicted that increased imports from the US due to DR-CAFTA will result in the loss of between 45,000 to 120,000 agricultural livelihoods (James, 2005). Proponents of DR-CAFTA admit that in this situation the hardest impact will be felt by the poorest 20 percent (Jaramillo et al., 2006). The introduction of DR-CAFTA will no doubt have similar effects and aggravate the already impoverished conditions in the region by increasing unemployment and the displacement of people.

Free trade theory predicts that lower prices for maize will help reduce poverty, not intensify it, because it will result in cheaper food and, thus, higher real incomes (Jaramillo et al., 2006; Lederman et al., 2005; Messerlin, 2005). However, lower prices at the farm level do not necessarily translate into lower food prices for consumers. In post-NAFTA Mexico, substantially lower maize prices saw a dramatic rise in the price of maize food, including a 279 percent increase in the price of tortillas (Fanjul & Fraser, 2003; Ricker, 2004). When maize prices for farmers were reduced in Guatemala in 1996 and 2001, prices for maize paid by consumers rose on both occasions (Oxfam, 2005). The flaw in the free trade theory is that the benefits of reduced prices are not necessarily received by the consumers, and can be captured by industry between production and consumption. In the Mexican tortilla case, benefits were captured by the highly concentrated import sector, whose profits simply increased (Fanjul & Fraser, 2003; Ricker, 2004). Therefore, an influx of cheap American maize will not alleviate impoverished conditions in Central America; it may even intensify food crises in the region, where already 1 in 4 people are estimated to suffer from hunger (Ricker, 2004).

CONCLUSION

Upon analyzing DR-CAFTA, it can be argued that the agreement is an attempt by the US to bilaterally further its own policy objectives, even to the detriment of the peoples of Central America. DR-CAFTA is shown to be greatly biased towards US interests, since it (i) does not include restrictions of any kind on the huge levels of domestic subsidies supplied by the US, and (ii) allows them to continue circumventing WTO rules on

11 In economic terms, "real" signifies that the measure of inflation has been removed from the calculation

dumping to ensure deep access to the Central American market. At the same time, the US' restrictive tariffs on sugar are permitted to continue, even though they stifle growth in a market with large potential for the Central American economies.

Although white maize was exempted from tariff reductions and other products were categorized as SACs (thus designated with special accommodation), both amount to little tangible benefit for the farmers and peoples of Central America. Central American farmers of white maize will likely still be negatively impacted by imported US yellow maize, and the Free Trade Commission still has authority to speed up tariff reductions on SACs – as the NAFTA Commission did in Mexico. Importing more US maize will surely aggravate the spreading of GMOs in Central America that is already occurring, and, in conjunction with adoption of UPOV-91 that is dictated by DR-CAFTA, US biotech corporations will steadily gain access and control of Central American markets. More immediate effects will also be felt in Central America, as were witnessed in Mexico after the implementing of NAFTA. The flooding of the Central American markets with subsidized US maize will force farmers in the region out of work and to lose income. In contrast to free trade theory, the lower maize prices may not necessarily lead to cheaper food; as was seen in Mexico, the trade agreement may lead to an increase in food prices for the consumer, which would throw many more people into the clutches of hunger and poverty.

In the end, there is a certain irony in the fact that the WTO, which has long taken the brunt of attacks by many activists and social movements, now represents an avenue of hope for the Central American people. If the final text of the Doha round included stipulations that instituted the end of (or a drastic reduction in) domestic subsidies, and if the text revised the definition of price in the context of dumping to include the full costs of production as well as profits, the US' ability to dump maize in Central America would be severely limited. Additionally, a Doha conclusion that revised TRIPS to limit IPRs for plant varieties could provide incentives to strengthen the Cartagena Protocol, which would limit the unwanted intrusion of GMOs into Central America. Although thinking the WTO could institute such drastic changes seems overly optimistic, the international reach of the WTO makes it one of the only currently practical means by which to counter the powerful influence of the US. This makes the future negotiations of the WTO critical for the peoples of Central America and, similarly, other peoples of the Global South.

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Women and Social Movements: Engendering Argentina's *Piquetero* Movement

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ABSTRACT – *The piquetero movement arose in Argentina in the 1990s as a response to high rates of unemployment, and a sizeable proportion of this movement – including some of its most militant members – are women. In a context where it is often assumed that women play less of a visible role in the public sphere than men, this paper explores what reasons can best explain women's high participation rates in the piquetero movement. This paper argues that women are involved in the movement in such large numbers for three main reasons. First, the movement is framed in a way that encourages the creation of a unitary, collective identity along traditionally gendered divisions of labour. Despite the problematic, gendered nature of these framing methods, they have nevertheless enabled women's easy involvement in movement. Second, participation in the movement allows women to meet practical gender interests, thus encouraging their participation. Finally, membership to the piquetero movement can address women's strategic gender interests. This paper is largely grounded in Molyneux's (1985) theory on strategic and practical gender interests, and the findings are partly based on field research, participant observation and personal discussions in Greater Buenos Aires, Argentina.*

RÉSUMÉ – *Le mouvement piquetero est né en Argentine durant les années 1990s comme réponse au niveau élevé de chômage. Une proportion non négligeable de ce mouvement, incluant certain de ces membres les plus militants, sont des femmes. Dans un contexte où il est souvent supposé que les femmes jouent un rôle moins visible dans le domaine publique que les hommes, cette rédaction explore quelles raisons peuvent le mieux expliquer la grande participation des femmes dans le mouvement piquetero. Cette rédaction prend la position que les femmes sont impliquées dans le mouvement dans tel grand nombre pour trois raison principales. Premièrement, le mouvement est cadré d'une façon qui encourage la création d'une identité collective et unitaire axée sur une division du travail traditionnellement déterminé par le genre. Malgré la nature problématique de ces méthodes d'encadrement basé sur le genre, elles ont néanmoins facilité l'implication facile des femmes dans le mouvement. Deuxièmement, participer au mouvement permet aux femmes de combler les besoins pratiques de leur genre, par conséquent encourageant leur participation. Finalement, l'adhésion au mouvement piquetero peut adresser les besoins stratégiques. Cette rédaction est largement axée sur la théorie de Molyneux (1985) à propos des intérêts pratiques et stratégiques du genre, et les constatations sont partiellement basées sur la recherche en terrain, l'observation comme participant-e et sur des discussions personnelles dans la région du Plus Grand Buenos Aires, en Argentine.*

INTRODUCTION

According to Linda Lobao (1990), women in Latin America are less involved than men in nearly all arenas of public life. Although this assertion is one that is commonly made by academics, the case of the *piquetero* movement in Argentina exposes a variation on this trend. The *piquetero* movement arose in the

1990s as a result of high rates of unemployment and is comprised largely of women – they make up 65 percent, in fact (Di Marco, 2007). Furthermore, some of the movement's most militant members are women (Petras, 2003). In a context where women seemingly participate in the public sphere less than men, what explains their high participation rates in the *piquetero* movement? This paper answers this question by arguing that women participate in the *piquetero* movement in such high numbers for three important reasons. First, the presence of a discourse based on strong, traditional conceptions of unity and family facilitates women's involvement – while at the same time reinforcing traditional divisions of labour. Although this is problematic, since it encourages participation in specific, gendered ways and reproduces patriarchal structures within the movement, it has nevertheless created a space for women's participation. Second, participation in the movement can allow women to meet their *practical gender interests* in the short term, intermediate and long term, thus encouraging women to engage in the movement. Maxine Molyneux conceptualizes practical gender interests as those that "arise from the concrete conditions of women's positioning within the gender division of labour" (1985, 233). Due to women's primary association with domestic responsibilities, these interests often include ensuring the well-being of their family and their community (Molyneux, 1985). Finally, the *piquetero* movement enables female participants to pursue *strategic gender interests* by gaining leverage within the home, renegotiating their positions outside of the home, and advancing their rights as women. Strategic gender interests are defined as those interests that "women (or men, for that matter) may develop by virtue of their social positioning through gender[ed] attributes" (Molyneux, 1985, 232). These gender interests arise from deductively recognizing one's position of subordination within society and generally aiming to overcome oppressive societal structures and achieve freedoms (Molyneux, 1985).

STRUCTURE AND THEORY

This paper is divided into two main sections, preceded by an overview of the genesis and features of the Argentine *piquetero* movement. The first main section, dealing with how the *piquetero* movement has been framed, will build on the work of several academics, including Jesus Casquete (2006) and Lobao (1990). The second section will explore women's opportunities to meet practical and strategic gender interests via the *piquetero* movement, drawing largely on the typology of gender interests developed by Molyneux (1985). Molyneux's delineation of gender interests has been criticized for reinforcing the false assumption, often made by Western feminists, that a gendered dichotomy exists between the public and private spheres (thus making it difficult to see how women can defend their practical demands in the public sphere if these demands require action from within the private sphere) (Stephen, 1997). However, her paradigm is nevertheless useful in characterizing how the *piquetero* movement can act as a site where women can meet various gender interests. In particular, Molyneux's typology will be used in this paper to delineate the opportunities that the *piquetero* movement can open up for some women – recognizing, however, that these opportunities will not be shared by *all* women, nor will participation in the movement necessarily allow women to meet their practical and/or strategic gender interests. This paper will utilize Molyneux's conceptualization of gender interests – specifically dividing them into practical and strategic – for the sake of clarity and analysis, recognizing that, in reality, these boundaries are easily blurred.

The evidence for this paper is partly based on research conducted in Buenos Aires, Argentina, including reflections based on participant observation and a formal interview with the female leader of the *Movimiento de Trabajadores Revolucionarios "Mario Roberto Santucho,"* a *piquetero* group based in Quilmes, Argentina[1]. This paper attempts to add to the literature on women's interaction with political protest, a field that Einwohner, Hollander & Olson (2000) argue has been under-theorized.

THE *PIQUETERO* MOVEMENT IN ARGENTINA – AN OVERVIEW

As mentioned earlier, the Argentine *piquetero* movement began in the 1990s – emerging particularly in Buenos Aires – as a response to high unemployment rates and dramatic increases in poverty. In the early 1990s, the Argentine government abruptly instituted massive neo-liberal reforms and privatized more than 90 previously state-owned enterprises, including water, telephones, highways, hotels, and ports, to name

1 The *Movimiento de Trabajadores Revolucionarios "Mario Roberto Santucho*," or Revolutionary Worker's Movement "Mario Robert Santucho" was formed in 2005 following a split from the first Unemployed Worker's Movement "Teresa Rodrigues." Named after Mario Robert Santucho, a guerilla commander of the *Ejercito Revolucionario de Pueblo* (*ERP*), or People's Revolutionary Army, who was killed on 19 July 1976, the movement is currently led by Susi Paz, who resides in Quilmes, Argentina. The movement is comprised primarily of chronically unemployed individuals who, despite their lack of formal employment, refer to themselves as 'revolutionary workers.'

a few (Dinerstein, 2001). This process was influenced by corruption and, in some cases, was even contrary to national law (Teubal, 2004). Although these reforms did result in some short-term economic benefit, they intensified poverty and caused unemployment to steadily increase over the next decade. By 2002, there were 21 million people in Argentina living below the poverty line and more than 20 percent of people in urban areas were unemployed (Dinerstein, 2001). The *piquetero* movement grew out of this social and economic unrest, bringing together the chronically unemployed, underemployed and poor individuals, as well as their families and supporters (Epstein, 2003).

Piquetero literally means 'picket' or 'picketer,' and refers to the fact that the *piqueteros* construct temporary road blocks and picket lines on busy roads and highways in order to attract government attention (Epstein, 2003). The use of roadblocks is said to be successful in garnering government attention since a roadblock "halts both production input and output. Like a debilitating strike, it hampers the elite from accumulating profit" (Chatterton, 2005, 552). Roadblocks have worked particularly well for the *piqueteros* since, being unemployed, they cannot use more common methods, such as holding strikes, in order to make their demands heard (Chatterton, 2005).

The *piquetero* movement is a series of highly organized networks that have made their presence extremely visible in Greater Buenos Aires and other areas of Argentina. For instance, in August 2001, 100,000 *piquetero* groups blockaded over 300 highways throughout Argentina in a massive, coordinated effort to bring the economy to a standstill and command government attention (Petras, 2003). The movement is structured in a horizontal manner, comprised of neighbourhood-based associations that operate on an 'assembly-style direct representation' model (Petras, 2003). Many *piquetero* groups demand that government officials negotiate with the collective group, in the streets, to ensure equal representation and to discourage individual members from being 'bought-off' by government officials (Petras, 2003).

In a number of cases, the *piqueteros* have been involved in violent clashes while guarding their roadblocks. For instance, on 26 June 2006 five *piqueteros* were killed by police gunfire while keeping watch over a blockade (Dinerstein, 2001). Thousands of militant *piqueteros* have been arrested and jailed for their participation in demonstrations (Petras, 2003).

The *piquetero* movement has been somewhat successful in commanding government attention and having their demands met (Petras, 2003). The *piqueteros*, with their continued pressure, have forced the government to (i) create thousands of minimum-wage, temporary jobs; (ii) deliver food parcels to the unemployed poor; and (iii) provide other means of unemployment support (Petras, 2003). In addition, they have established community projects, such as collective gardens, food kitchens, health clinics and schools (Zibechi, 2005). Some *piquetero* organizations have also initiated reciprocal exchange forums with other groups to engage in methods of exchange that go beyond the formal market (Zibechi, 2005). Zibechi, in the *NACLA Report on Social Movements* states: "In sum, they [the *piqueteros*] are creating community, producing and providing for their own lives based on criteria of solidarity and personal initiative. They are not only concerned with what they do, but how they do it" (2005: 17-18).

Despite their successes, the *piqueteros* have faced challenges. The *piquetero* movement has suffered fragmentation in the recent years – particularly under the Kirschner government, which, according to many, attempted to co-opt the movement by instituting a *piquetero* arm in the government (Zibechi, 2005). The sustainability and long-term success of the *piquetero* movement remains to be seen; however, it is speculated that in order to succeed, the *piqueteros* need to remain autonomous from government interventions (Zibechi, 2005).

As mentioned earlier, women have become active in the movement and now make up over half of its membership. However, their roles are often gendered and their participation is subject to patriarchal norms. Despite this, some female *piqueteros* refer to themselves as *piqueteras*; they have been able to obtain high-level positions within the movement and are using the movement as a site to struggle for women's rights. The remainder of this paper will examine the gendered nature of the *piquetero* movement, including how the movement is framed and what this has meant for *piqueteras* in terms of meeting their practical and strategic gender interests.

FRAMING THE *PIQUETERO* MOVEMENT

The fact that women make up more than half of the *piquetero* movement in Argentina can be attributed, in part, to the way that the movement is framed. Generally, the movement has been framed in two main ways: first, as a movement that emphasizes a strong sense of collective identity; and second, as a movement that promotes family security and a traditional division of labour. This section will examine these two framings, arguing that although they have created a space for women to participate in the movement, they are gendered

in nature and often contribute to reproducing patriarchal societal structures within the movement.

The development of a group identity is a fundamental aspect of collective action (Casquete, 2006). Given this, the process of identity (re)production has been crucial to the framing of the *piquetero* movement, particularly in terms of creating a collective identity. Identity can be formed in a number of ways. Firstly, group identity can be created by developing an understanding of 'we' (Casquete, 2006). This construction of 'we' defines a group in opposition to an 'enemy,' creates solidarity and increases a sense of community within the group. Secondly, a collective identity can be formed through large group activities, such as protests and meetings, which bring people together to struggle for a common end (Casquete, 2006). Both of these features are present within the *piquetero* movement. In Javier Auyero's (2003) account of the *piqueteros* of Cutral-co, he details that their collective identity is based on notions of 'we' versus 'them.' The *piqueteros*, who held a series of protests and road blockades in the province of Neuquen following the privatization of petroleum company YPF in 1992, constructed government officials as a common enemy and asserted that "We are citizens, we are self-convened neighbours, we are the people." Similarly, during an interview with Susi Paz, leader of the *Movimiento de Trabajadores Revolucionarios "Mario Roberto Santucho,"* Paz explained that even though she is officially the leader of the organization, she believes that all members are equal and that "all are one" (personal interview, 23 May 2007; my translation).

The construction of a unitary identity has been useful in strengthening the *piquetero* movement; however, it has had mixed outcomes for women. On one hand, the framing of the movement as 'cohesive' has allowed women to integrate into the movement smoothly, since it is generally thought that women's involvement with the *piqueteros* strengthens the movement in terms of numbers, rather than threatening its structure. Women, whether or not they plan on ultimately challenging the patriarchal nature of the movement, are welcomed into the movement with little suspicion from those who believe that patriarchal structuring should be maintained. As will be detailed below, this acceptance can be positive for women who depend on the movement to help them meet their practical gender interests.

On the other hand, the identification that 'all are one' has allowed little room for women within the movement to express concerns about gender equality or women's rights, and has thus hampered women's abilities to use the movement as a forum for meeting their strategic gender interests. While some female *piqueteros* are in fact struggling to have gender issues acknowledged within the movement, as will be discussed in more detail below, this is a difficult and complex process (Di Marco, 2007). Accordingly, women's involvement in the *piquetero* movement can be best described by Sheila Rowbotham's (as cited in Molyneux, 1998) notion of 'women in movement,' which refers to women acting collectively to pursue goals that are common but not necessarily feminist in nature.

In addition to a narrative of unity, the *piquetero* movement's focus on the family has facilitated women's involvement, albeit in specific, gendered ways. In Argentina, the economic crisis of 2001 - 2002 seriously affected the economic stability and livelihoods of many families. The *piquetero* movement arose as an attempt to protect workers' families from the pressures of unemployment and poverty, and it is largely still presented as a movement that centers on addressing the needs of the family. Zulma, a member of the Cutral-co *piqueteros*, recounts the demands of the *piqueteros* when she states, "We wanted jobs…we wanted answers from the government, we wanted to have something so that our children could study" (Auyero, 2003, 77). This *piquetero* group attempted to address these concerns by organizing community gardens and initiating income-generating enterprises, in addition to directly lobbying the government.

Further evidence of the existence of a family-based discourse can be seen in a special report on the *piqueteros* in the Argentine newspaper *Clarín*. In this article, it is reported that women's involvement in the movement is seen as a struggle to ensure the well-being of their children: specifically, in demanding healthcare services and education opportunities (Young, Guagnini & Amato, 3 September 2002).

A personal visit to the *Movimiento de Trabajadores Revolucionarios "Mario Roberto Santucho" piquetero* group on 18 May 2007 uncovered similar values. Here, the family services provided by this *piquetero* organization – such as a food program for children, a housing cooperative and a healthcare centre – appeared to be a central element of its function. These findings indicate that the movement is not merely understood as a platform to lobby the government, but is also seen as a family organization that provides essential services to ensure the well-being of its members' families and their communities.

The fact that the *piquetero* movement is based on a discourse of the family facilitates women's involvement in the movement. Lobao's (1990) work on women in guerilla movements is particularly useful in supporting this argument. Lobao's findings indicate that since women are often considered to be responsible for many aspects of family life, they are more likely to participate in a revolutionary movement when the

survival of their family is at risk. Although the *piqueteros* are not a guerilla group, this logic can be extended to understand why women participate in the movement in such large numbers, since their family's well-being is in jeopardy.

Finally, women's participation in the *piquetero* movement is enabled by the fact that the *piquetero's* roles are often divided along traditional, gendered lines. Lobao (1990) argues that women's traditional gender roles often persist even when women move from the domestic sphere to the political sphere. Additionally, Einwohner et al. (2000) assert that those social movements that are constructed using traditional gender ideologies are more likely to be widely accepted than those that engage with innovative ideas of gender. The *piquetero* movement provides evidence for these notions. Although some *piquetero* organizations are headed by women, including the *Movimiento de Trabajadores Revolucionarios "Mario Roberto Santucho" piquetero* group (headed by Susi Paz), most women are involved at lower levels – for example, through the management of community projects (Di Marco, 2006b). In fact, women have been described as the silent driving force behind the *piquetero* movement as a result of their efforts to organize community activities, run healthcare centers, operate community kitchens and work in textile cooperatives (Young et al., 3 September 2002). In Auyero's (2003) illustration of Laura Padilla's experience with the Cutral-co *piqueteros*, Laura describes many of the women as being in charge of cooking food at protests, taking care of the children, and preparing *mate*. Similarly, I found that in the case of the *Movimiento de Trabajadores Revolucionarios "Mario Roberto Santucho,"* women are often put in charge of ensuring the security and well-being of participants during protests. While women's engagement in the movement can transform their social position, moving them from the private to the public sphere, women continue to be responsible for traditionally female tasks.

The fact that women often occupy orthodox gender roles within the *piquetero* movement has had mixed outcomes. While their participation at lower levels has facilitated their involvement and allowed them to integrate into the movement with ease, it is less clear whether or not they have been able to meet their practical and strategic gender interests through such roles. Based on Auyero's (2003) account of the *piquetero* group in Cutral-co and my observations at the *Movimiento de Trabajadores Revolucionarios "Mario Roberto Santucho"* group, women's involvement in the movement can undoubtedly allow some women to meet their practical gender interests. While it is important to remember that not *all* women benefit in the same way from membership to the *piquetero* movement, it offers a level of collective support that has eased the challenges of unemployment and poverty. Strategic gender interests, on the other hand, are generally very difficult, if not impossible for women to achieve while occupying traditional, gendered roles. However, it is important to note that some women are beginning to reject traditional roles and are struggling to emerge as new social actors within the movement (Di Marco, 2007). This can be seen as more women assume leadership roles, participate in protests on the streets and engage in national women's *encuentros*, as will be explained in more detail below. While the results of these important efforts remain to be seen, these struggles, if successful, could have positive, albeit complex, effects on women's abilities to meet strategic gender interests. For the time being, it is important to acknowledge that the way in which the *piquetero* movement is framed – using a discourse that promotes unity, the family and traditional gender roles – facilitates and enables women's involvement.

GENDER INTERESTS AND THE *PIQUETERO* MOVEMENT

Thus far, this paper has examined the gendered framing of the *piquetero* movement, arguing that it is an important factor that has enabled women to participate in the movement. This section of the paper will turn to explore two sets of interests that have motivated or pushed women to participate in the movement. Grounded in Molyneux's (1985) conceptualization of practical and strategic gender interests, this section will argue that the opportunity created by the *piquetero* movement for women to meet their gender interests has provoked women's participation in the movement in such large numbers.

Participation in the *piquetero* movement has given women the opportunity to assert their practical gender interests in the short-term, medium-term and long-term. As mentioned earlier, practical gender interests are described as those that surface because of women's location within traditional, gendered divisions of labour (Molyneux, 1985). According to Molyneux (1985), these types of interests are often characterized as a reaction to an immediate, practical need, such as food, shelter or clothing – and they do not challenge larger structural inequalities. While practical gender interests reflect individual interests and needs, they are also often conflated with elements of domestic welfare. In this sense, although men can have practical gender interests, women often struggle the most in meeting practical gender interests for themselves (and their families) because of their gendered position within society. Practical gender interests are also linked with class (and racial) categorizations, since poorer women (particularly women of colour) often struggle most to achieve practical interests (Molyneux, 1985).

As a result of worsening economic conditions in Argentina, unemployment rates rose from 6 percent in 1990 to 20 percent in 2002, at the height of the economic crisis (Berg, Ernst & Auer, 2006). Female unemployment has historically been higher than male unemployment in Argentina. For instance, in 2003, following the economic crisis, the female unemployment rate reached 19.5 percent, compared to the male unemployment rate, which measured 15.5 percent (Berg et al., 2006). With high unemployment rates, increasing inflation and escalating poverty, many families continue to struggle to satisfy basic needs (Epstein, 2003). Membership to the *piquetero* movement represents an important possibility for many women to meet their practical gender interests in the short-term. In fact, involvement in the movement has been deemed a survival strategy for some (Di Marco, 2006a). This is partly due to the fact that the *piquetero* movement is more than just a network for protest – it is a community organization that provides social services, such as community gardens, healthcare centers and schools, and employment, through cooperatives and workshops (Zibechi, 2005). The movement has opened up a space for members to produce services and goods for the community and their families based on a notion of solidarity (Zibechi, 2005). Through their association with the *piquetero* movement, women can access food programs, childcare support, health and other services, thus satisfying many of their short-term gender interests.

In addition to these short-term interests, involvement in the *piquetero* movement can address intermediate gender interests. Most importantly, participation in the movement can facilitate women's access to government unemployment subsidies, such as the *Plan Jefes y Jefas de Hogar Desocupados* (*PJJHD*) (Di Marco, 2007). This is especially important for women who, as mentioned above, face greater challenges in finding employment and who are often responsible for family well-being (Berg et al., 2006; Molyneux, 1985). The *PJJHD* is a monthly government subsidy that is available to unemployed female and male heads of households. While only 100,000 of the 2 million beneficiaries of this program are *piqueteros*, it is easier to access this subsidy via involvement in a *piquetero* organization (Epstein, 2003). It is important to note, however, that if a *piquetero* organization decides to develop *clientelist* ties with the government their chances of accessing the *PJJHD* are often increased. While some groups have decided to work with the government in this manner – at the benefit of increased funding, while at the expense of loss of independence and, sometimes, credibility – many *piquetero* groups, including the *Movimiento de Trabajadores Revolucionarios "Mario Roberto Santucho"* group, have chosen to resist government co-optation and remain a horizontal, non-hierarchical group. Given this, women's involvement in the *piquetero* movement – especially involvement in *clientelist* groups – can help satisfy their intermediate practical gender interests by facilitating their access to government-funded financial support.

Long-term practical gender interests can also be met by involvement in the *piquetero* movement. By staging protests and public demonstrations, the *piqueteros* hope that the government will respond to their ultimate demand of securing meaningful employment and a living wage (Petras, 2003). If this goal is achieved, a stable income through tenable employment could ensure that women are able to meet many of their practical gender interests in the long-term. Involvement in the *piquetero* movement can be seen as advancing this effort.

As demonstrated, engagement in the *piquetero* movement can assist women in asserting their practical gender interests over various periods of time. Consequently, this process can be understood as an important factor that drives women to participate in the movement, and provides one explanation for the large presence of women in the movement. However, women's gender interests are not exclusively *practical*. As women increasingly move into the public sphere, many are struggling to have their *strategic* gender interests recognized and met (Safa, 1990).

Molyneux (1985) defines strategic gender interests as those that aim to overcome larger structural gender inequalities and redefine the role that women play in society. While struggles in the name of strategic gender interests are often considered to be an act of feminism, it is important to note that not all female *piqueteros* (*piqueteras*) identify themselves as feminists. As will be explained in further detail below, involvement in the *piquetero* movement can help meet strategic gender interests by providing women with a means to gain leverage inside the home, renegotiate their position in the public sphere and advance their rights as women in other domains.

Historically, women have been viewed as subordinate to men. This is partly because women have traditionally occupied positions within the domestic sphere – an arena that is ascribed less social value than the public sphere (Lobao, 1990). However, some feminist literature argues that when women enter into the workforce, thus earning a salary, they can gain leverage and renegotiate their position in the home (Lobao, 1990). Although involvement in the *piquetero* movement does not necessarily result in an income from formal

employment, it can facilitate women's access to financial subsidies, as mentioned earlier, via the *Plan Jefes y Jefas de Hogar Desocupados* (*PJJHD*) (Di Marco, 2007). Furthermore, the *PJJHD* requires that its beneficiaries complete community service work in turn for the subsidy they receive (Di Marco, 2006b). Many women report that they highly value this work since it often represents their first formal experience outside of the domestic sphere (Di Marco, 2006b). Both the income from the subsidy, as well as the work experience gained through the program, can assist in dismantling traditional gender hierarchies within the family, thus allowing women to gain leverage within the home. Through this process, engagement in the *piquetero* movement can be understood as a means for women to meet an important strategic gender interest in the private sphere.

Participation in the *piquetero* movement can also provide a mechanism through which women can meet strategic gender interests within the public sphere. In particular, women's involvement can enable them to renegotiate their position in society and gain recognition as social and political actors. Since women are often excluded from participation and positions of leadership in political parties and institutions at a national or regional level, many women choose to become involved in community organizations (Handelman, 2006). Women's participation in the *piquetero* movement can be understood as an example of this trend. By engaging in the *piquetero* movement, women can develop a new experience of citizenship, based on their active involvement in the movement, as well as the identity that this participation constructs (Di Marco, 2007; Auyero, 2003). Furthermore, connection to the *piquetero* movement allows women to leave the confines of their home – through participation in protests, community organizations or the *PJJHD*, amongst others – and enter into the public sphere, thus establishing new relationships with others (Auyero, 2003; Di Marco, 2007). Through this process, women can determine their allies and their opponents, share their experiences with others, break patterns of isolation and silence, and engage in collective action in public spaces (Di Marco, 2006b). Through their involvement in the public domain, women can gain a sense of belonging and respect within the community. In an interview with Susi Paz, one of the only female leaders of a *piquetero* organization, Paz expressed great feelings of respect she receives as a result of her position as a *piquetero* leader. She explained that her fellow community members respect her because they understand the link between her political actions and the positive developments that have occurred in their community (personal interview, 23 May 2007). Similarly, from Auyero's (2003) account of Laura Padilla's involvement with the *piqueteros*, it is clear that Laura participated in the Cutral-co road blockades primarily to re-write her identity from one of an abused wife to one of a publicly respected woman, or, as she liked to call herself, a *piquetera*. Although it is critical to remember that not all women have a similar experience to that of Paz's and Padilla's, and that participation in the *piquetero* movement does not automatically allow women to meet their strategic gender interests, the *piquetero* movement has provided an opportunity for some women to move from the private to the public sphere, develop new terms of citizenship and transform their role within society. In this sense, involvement in the *piquetero* movement has enabled some women to meet strategic gender interests.

Finally, involvement in the *piquetero* movement can allow women to advance their rights in other areas. In the 1970s, women in Latin America began to organize meetings, called *encuentros*, for women to discuss a variety relevant and important issues such as reproductive rights, sexual education, labour rights and inequalities between men and women (Jaquette, 1994). In 1986, following the general success of the *encuentros*, Argentina began to hold national *encuentros* called *Encuentras Nacionales de Mujeres*. Many groups continue to attend these conferences, including, as of 1997, various *piquetero* organizations (Di Marco, 2007). While some women feel that the *encuentros* result in no concrete action, many women feel that they are an important forum for advancing women's rights (personal interview, 23 May 2007). By providing an opportunity to attend *encuentros*, women's connections to the *piquetero* movement has enabled them to further engage in struggles to meet specific strategic gender interests.

Involvement in the *piquetero* movement can allow women to advance their strategic gender interests. As discussed, the *piquetero* movement enables women to gain authority within the home, renegotiate their experience of citizenship and voice their demands in a public manner. Arguably, the opportunity to meet strategic gender interests offers an explanation for the large presence of women within the *piquetero* movement.

CONCLUSIONS

The *piquetero* movement is not without contradictions or weaknesses. In terms of gender equality, the *piquetero* movement faces some shortcomings, including the fact that it is framed using patriarchal discourses and often ascribes traditionally gendered tasks and roles to women. However, women are neither a minority in the movement, nor are they passive actors. As has been detailed, women make up 65 percent of the members;

they are amongst the most militant members, and some women, such as Susi Paz of the *Movimiento de Trabajadores Revolucionarios "Mario Roberto Santucho*," have even been able to attain positions as leaders and decision-makers (Di Marco, 2007; Petras, 2003). In this paper, I have argued that women are involved in the movement in such large numbers not only because the movement is framed in a way that enables their involvement, but also since participation in the movement allows them to meet practical and strategic gender interests. For many women, involvement in the *piquetero* movement has fundamentally changed their identity and social consciousness, resulting in a "point of no return" (Di Marco, 2006b).

Despite the significance of the movement, several factors remain unclear about the future of women's involvement. Helen Icken Safa (1990) argues that women's social movements not only *come about* through the blurring of the division between the private and public spheres, but that they *advance* this blurring. Although the *piquetero* movement is not a women's movement *per se*, the movement has grown as a result of a blurring of the public and private spheres. This has occurred as women have moved from the private to the public arena to deal with the consequences of chronic poverty and unemployment. However, whether or not the *piquetero* movement will *advance* the convergence of the public and private spheres has yet to be seen. As more women learn about the leadership roles played by women like Susi Paz and Laura Padilla, will they be encouraged to be involved in a manner that departs from traditional gender roles? In other words, will women challenge and contest the patriarchal framing of the movement? If so, will this limit women's space within the movement, or will it open up new space for their involvement? These questions – among others – remain to be answered. As Einwohner et al. (2000) assert, a deeper understanding of the reciprocal relationship between gender roles and social movements is needed.

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Going Back to Move On: Notions of 'Home' in the Context of Voluntary Repatriation

Grace Baey

> The end of the war allowed a physical return, but home was not to be found and the past was not to be recreated. All roots seemed to be severed. Ironically, it was only then that I became homeless, while I had lived all those years in exile as a temporary displacement.
> — Naila Habib, *The Search for Home*

> The man who finds his homeland sweet is still a tender beginner;
> He to whom every soil is as his native one is already strong;
> But he is perfect to whom the entire world is as a foreign land.
> — Hugh of St. Victor, *Didascalicon*[1]

ABSTRACT – *Voluntary repatriation is considered the most ideal and desirable amongst three 'durable' solutions to refugee situations—these being voluntary repatriation, integration, and resettlement. This paper contends that the policies of repatriation confront far more than a matter of logistics and the visible need for settling people back in place. We must be ready to engage with problems of 'ordering' in our changing world; in this regard, I argue that there is considerable difference between the ideas of 'return' and 'home' among the views of policymakers and the actual experiences of refugees. Particularly, the inability of repatriation discourse to adequately address locally specific conditions that produce refugee flows has resulted in severe limitations to its effectiveness and viability. Concerning this, I propose the need to look beyond linear equations of identity and place—that is, country of origin = belonging = home—to take up deeper questions pertaining to the relationships of place to movement, identity to place, and identity to movement, as starting points for a more critical discourse.*

RÉSUMÉ – *Le rapatriement volontaire est considéré comme la solution la plus idéale et désirable parmi trois solutions "durables" aux situations des réfugiés- celles-là étant le rapatriement volontaire, l'intégration et la réimplantation. Cette rédaction propose que les politiques de rapatriement font face à beaucoup plus que de simples questions de logistiques et le besoin visible d'installer les gens encore en place. Nous devons être prêt à engager les problèmes de « classement» dans notre monde changeant; dans ce regard, j'argumente qu'il existe une différence considérable entre l'idée de « retour » et de « chez-soi » parmi les opinions des politiciens et les expériences réelles des réfugiés. En particulier, l'inhabilité du discours de rapatriement d'adresser adéquatement les conditions localement spécifiques qui produisent les courants de réfugiés a résulté dans des limitations sévères à son efficacité et sa viabilité. Ce concernant, je propose l'importance de voir au-delà d'équations linéaires d'identité et place- c'est-à-dire, pays d'origine = appartenance = chez-soi- pour relever des questions plus profondes pertinentes à la relation de place au mouvement, identité à place, et identité à mouvement, comme point de départ pour un dialogue plus critique.*

1 From Hugh of St. Victor's treatise, *Didascalicon*, Book 3, Chapter 19. For translation, see Jerome Taylor's *The Didascalicon of Hugh of St. Victor* (New York, 1991), p.101.

INTRODUCTION

The concept of displacement stems from the act of being moved or uprooted from one's place of residence—or 'home,' as it is commonly referred—often with the implication of an awaited return. Formally, we understand this space to demarcate a territorialized area in which persons or communities enjoy freedom of rights and mobility within. That which ties a person to place—that is, membership within this territory—is subsequently recognized through notions of citizenship ascribed to a particular nation-state. As such, a displaced person, or refugee, may be defined as an individual who has transcended this sovereign boundary as a result of general estrangement from his/her place of original residence. It is commonplace to behold media depictions of impermeable swarms of refugees spilling over borders, especially in the Global South; often, this is encapsulated within the language of emergency and catastrophe seeking to inspire change and intervention. Taking these into account, it seems reasonable that conventional approaches to refugee situations should naturally work to re-establish and restore affected persons back to their homelands. In fact, the Office of the United Nations High Commissioner for Refugees (UNHCR) proclaims voluntary repatriation to be the most desirable among three 'durable' solutions to refugee situations—voluntary repatriation, integration, and resettlement (UNHCR, 1980; cited in Warner, 1994; Harrell-Bond, 1989).

Every displaced person should have full rights and liberty to return home on his/her own accord (Harrell-Bond, 1989). Whether or not this always represents the most expedient of choices largely remains debatable. This paper raises the challenge that the policy of repatriation confronts far more than an issue of logistics and the visible need for putting people 'back in place.' On the contrary, I argue that there is considerable difference between the ideas of 'return' and 'home' among the views of policymakers and the actual refugee experience itself. There is a need to inquire into the often ill-defined discrepancy between what may be referred to as *the refugee problem*—that is, the crisis of national destabilization—and *the refugee's problem* in seeking secured livelihoods. Particularly, the inability of repatriation discourse to adequately address the many locally specific conditions that produce refugee flows has resulted in severe limitations upon its effectiveness and viability. The issue at hand demands a deeper engagement in terms of "the political and conceptual" (Eastmond, 2002, p.2) that extends beyond the limiting boundary of physical localities. The world of nation-states is, for the most part, a fairly recent phenomenon,[2] and national borders—or boundaries of 'home'—are only natural as far as dominant discourses of *Othering* construct them to be. In this regard, the refugee's prescribed marginality, as the depoliticized *Other*, functions discursively to define the *Us* who 'belong' in "the national (read: natural) order of things" (Malkki, 1992, p.33). Consequently, it becomes possible to challenge customary notions of 'home' to incorporate a dynamic expression of identity and belonging that expands beyond the material world of national roots and physical houses.

GEOPOLITICS: HOME AND TERRITORY

The age of nationalism entailed an essential geopolitical ordering of the world, which resulted in the allotment of territorial boundaries to nations for self-governance. In this strategic mapping of the political world, the productive power of maps to engender sovereign territory was effectively rendered by "a Cartesian perspectivism… [operating] through assumptions about the faculty of sight to produce the *siting* and *citing* of global politics" (Tuathail, 1994, p.259, 261, original emphasis). The most evident illustration of this would be the Berlin Conference in 1884, where European powers gathered together to debate the carving out of colonial Africa amongst themselves. The imposition of an institutionalized framework of geopolitical categorization in turn necessitated the creation of various representations of *Otherness* in order to determine modes of identity and inclusion. Here, we observe the workings of a "topography of power" that conditions practices of inclusion through exclusion, and which lies beneath the "power of topography" in spatial politics (Gupta & Ferguson, 1992, p.8). In the same manner, the refugee discourse is centered upon a problematization of the marginalized *Other*—that is, the individual that fails to be located within the boundaries of sovereign management.

Particularly, the refugee figure became embodied within its own discourse as the displaced individual in need of intervention to be put back in place—in other words, the framing of the refugee as "an object of knowledge and management" (Malkki, 1992, p.25) and a problem to be solved. Two competing dimensions subsequently entail: i) a *refugee problem*, surrounding the patriarchal management of seeming misfits in the present global *dis*order; and ii) the *refugee's problem* of fitting in (which I argue demands greater critical attention). It is unsurprising that a primary measure in arresting and containing the flows of refugees should

2 The idea of a nation-state, enshrined at the Treaty of Westphalia in 1648, was built upon the binding principles of state sovereignty and territoriality.

constitute one that is spatially-oriented. The refugee camp is a containment strategy designed to provide temporary assistance to displaced persons within an authorized and controlled area (Hyndman, 2000). In Malkki's (1992) words, it is "a technology of care and control—a technology of power entailing the management of space and movement—for people out of place" (p.34). However, beyond the provision of short-term relief to unexpected flows of refugees by keeping people artificially 'in place,' refugee camps are not long-term solutions to the refugee problem. On a broader level, it must be realized that spatial remedies, on their own, are incapable of addressing deeper constructs of power relations that often serve to produce and perpetuate refugee flows. This too may be applied to the policy of voluntary repatriation.

At this point, there are two quotes worth highlighting in our present discussion. In the first, Malkki (1992) emphasizes a need to probe beneath the rhetorical assumption of statehood and identity. Quoting Hannah Arendt, she asserts:

> Mankind, for so long a time considered under the image of a family of nations, had reached a stage where whoever was thrown out of one of these tightly organized closed communities found himself thrown out of the family of nations altogether… [Indeed,] the abstract nakedness of being nothing but human was their greatest danger (1973, p.294, 300; cited in Malkki, 1992, p.33).

Dayal (1996) takes us a step further in our critical challenge against "the old trinity of state-nation-territory" (Agamben, 1993, p.8; cited in Warner, 1994). Rejecting the prescribed label of refugees as 'peripheral strangers,' he contends that the refugee should instead be exalted as a pivotal figure in political history:

> [Diasporic double consciousness] interrupts the narratives of national purity or autonomy. [It] is more productively conceived as the interstitiality of entering [or leaving] and destabilizing the border zones of cultures, as fracturings of the subject that resist falsely comforting identifications and reifications. Its negative value is that it denies the subject's sovereignty and stresses the performativity of the subject. For *this* doubleness there could hardly be a richer figure than 'diaspora' (Dayal, 1996, p.49, 48, original emphasis).

On the grounds of these arguments, there is need to critically analyze the politics behind the production of space and place. How does one make a place out of space, and how natural is the customary link established between places and peoples? Even more so, should the articulation of 'home' be confined purely within a material and symbolic entity? It is likely that the notion of 'home' may come across as being simultaneously familiar yet inherently ambiguous in its orientation. Although human beings are territorial creatures in need of settlement, they are at the same time reflective and dynamic individuals with emotional cravings for belonging and attachment—these are homing desires that go beyond the subsistent need for shelter and security. In Terkenli's (1995) words, "the essence of home lies in the recurrent, regular investment of meaning in a context with which people personalize and identify through some measure of control" (p.325). The human search for home may therefore denote a perpetual imaginative journeying that does not require a culmination towards the singular end of spatial stabilization. In light of this, it may be argued that the inherent concept of home bears little or no relation to a person's country of origin or place of birth. It is instead a dynamic and characteristic expression of the natural conditions of change and mobility experienced throughout the course of human life.

DISCOURSE: THE POLITICS OF RETURN

According to Warner (1994), the discourse of voluntary repatriation is centered upon the prevailing liberal equation of "homogenous group = community = government = state = territory = home" (p.163). Stemming from this understanding, returning to one's own country of origin would therefore seem to be "the most 'natural' outcome of exile" (Eastmond, 2002, p.2)—that is, repatriation equals homecoming. The 1990s was deemed the decade of voluntary repatriation, when the number of refugees returning to their countries of origin peaked at approximately 12 million (Koser & Black, 1999). Lubbers, the then-UNHCR commissioner, proudly declared that he was now "high commissioner for returnees, not refugees," upon watching flows of refugees crossing the Iranian-Afghan border to make their way home to Afghanistan (Reuters, 15 April 2002; cited in Eastmond, 2002, p.2). Is the aim of refugee policy, however, simply an arrest of flows or the mere reduction of numbers? Furthermore, it remains largely uncertain as to whether repatriation would veritably ensure the retrieval and restoration of past livelihoods, or if this is even possible to any extent. What does it

mean to return home and how much of returning is, in reality, the experience of a new beginning rather than the return to an ideal past (Hammond, 1999)?

It is frequently assumed that natural order would be restored once a refugee returns to his or her place of origin, due to the fact that existing networks of kinship would readily aid in facilitating the integration process of the returnee. However, there is need to challenge these generalized assumptions and inquire into the nature of conditions that engender mobility as well as the degree of change that has taken place in the local setting amidst the period of exile. It is often typical for refugees to discover upon return that property and land rights have been lost as a result of their absence (Eastmond, 2002). Coupled with this, they face intense competition with local residents in terms of access to vital resources, social services, employment and educational opportunities (Hammond, 1999), in light of the general inability of already depleted local areas to cope with sudden inflows of 'returnees.' As such, returnees are required to re-negotiate their places within these new configurations of power and inequality (Eastmond, 2002). A problematic challenge for many post-conflict areas also lies in the lingering danger of land mines that are immensely costly and time-consuming to remove. Consequently, the assumption that it is most desirable and even possible for returnees to regain all of that which they enjoyed before displacement is an idea that is largely flawed and misinformed (Hammond, 1999).

There are varying modes of mobility within the context of displacement apart from the horizontal crossing of territorial boundaries. In particular, vertical shifts along one's socioeconomic ladder constitute an important aspect of migration. Compared to life in a refugee camp where basic health services and food supplies are often provided for by international aid organizations, repatriation for some may mean a significant drop in standards of living. At other times, better opportunities for success may be more readily available in a host area of asylum as compared to one's country of origin. We observe here a resultant juxtaposition of aspirations—that is, an idealistic inclination to return to one's place of birth versus the practical aspect of making the most of where one is (Hammond, 1999). Hammond (1999) also notes:

> [For many] the economic realities of return have [very often] conditioned ties to the ancestral home and resulted in the creation of different priorities, and even different loyalties, such that new ties to new places may eventually take precedence over the original association of identity and place (p.242).

As such, facilitating local settlement does not necessarily entail local integration, due to the fact that the dynamics of return may in reality be conditioned by economic opportunities rather than an idealized preference for kick-starting an irretrievable past.

The Cambodian refugee experience offers an illustrative example of the often dynamic and complex realities of return for many refugees. Far from being passive individuals in need of management, Cambodian refugees are remarkably active persons seeking to make the most out of their situations. Broadly speaking, changing circumstances are an inherent part of the subsistence lifestyle, and adaptability becomes a vital and necessary skill to cope with vulnerabilities stemming from largely unpredictable situations. In contrast to prevailing assumptions that kinship links would readily aid in facilitating the *re*-integration of returnees, many Cambodian refugees prefer instead to refrain from seeking out relatives due to fears of potential rejection by village members and to avoid the shame of being destitute (Eastmond, 2002). For these reasons, the idea of return for Cambodian refugees is marked by a sense of readiness to build new lives in new places. It is also not uncommon to encounter overt discrimination by local residents who tend to discredit them as "people from the camps… who took the wrong path" (Eastmond, 2002, p.12). Therefore, "forgetting, rather than remembering, one's origins or genealogical ties… may be a vital facet also of [the] Cambodians' localizing strategies" (Eastmond, 2002, p.10). Others indicate that the continual experience of having to start their lives over and over amidst exile has made the idea of 'going back' to the life they once knew to be something unpractical and even unthinkable (Hammond, 1999).

Reflecting upon the Cambodian refugee experience, we are persuaded to question both the effectiveness and credibility of the nature of voluntary repatriation. Indeed, what constitutes a durable solution—and durable for whom? Harrell-Bond (1989) has argued that returnee programmes are generally cheaper and less lengthy compared to assistance programmes in host countries, which makes repatriation a far more efficient and desirable policy for the UNHCR. She adds:

> With the current emphasis on mass exodus, there is also an emphasis upon mass repatriation, with the rights of refugees as individuals severely threatened: A somewhat less individual and less voluntary standard has been accepted and lauded (Harrell-Bond, 1989, p.44; Curry & Stein, 1988).

Consequently, a blurry line is established between the encouragement and promotion of repatriation and the pressure to repatriate (Ruiz, 1987; cited in Harrell-Bond, 1989). Returning to the Cambodian refugee example, it has been argued that the UNHCR's priority of encouraging the rapid return of refugees at the Thai-Cambodian border served mainly to facilitate the long-awaited democratic peace process in 1993 (Eastmond, 2002). Although this was probably perceived as the most practical option at that time, the overarching emphasis on its political agenda might have neglected the more concrete concerns of returnees, which centered more upon the need to secure livelihoods.

DYNAMISM: MOVEMENT AND CHANGE

"We can go back to a place, but we cannot go back in time" (Warner, 1994, p.171). As discussed earlier, 'home' is not a static entity that remains constant throughout time. Humans are in continual motion, and transitions are part and parcel of the dynamics of everyday life. Therefore, perceptions and meanings of home alter with evolving experiences. When a person is forced to flee his or her homeland, a major push factor might be the condition of having already lost what home was before—for example, civil war often results in the rampant destruction of houses and villages. The issue of time also plays a significant role in determining the ease of return: the longer the period of exile, the greater the difficulty in settling back in (Harrell-Bond, 1989). Should voluntary return be the ultimate intent for some, Koser & Black (1999) argue that "the mere removal of war and conflict may not be a sufficient condition to guarantee returnees full rights as 'citizens' [upon] return" (p.9). In view of the above issues, it therefore becomes difficult to think of repatriation as being synonymous with homecoming. In this regard, Malkki (1992) writes, "[identity is often] mobile and processual [and]… roots themselves are in a state of constant flux and change" (p.37). Moreover, "the roots don't stay in one place. They change shape… And they grow. There is no such thing as a pure point of origin" (Deleuze & Guattari, 1987, p.10; cited in Malkki, 1992, p.37).

Countering anti-sedentarist thinkers such as Malkki and Warner, Kibreab (1999) argues in favor of voluntary repatriation as the most important solution to the refugee problem. He asserts that globalization processes have not led to the increasing fluidity of national borders. On the contrary, the present world remains very much territorialized in its spatial orientation with place as "a major repository of rights and membership" (Kibreab, 1999, p.385). He argues further that territorially-based identities are indispensable to the allocation of rights that subsequently determine conditions of human well-being (p.385). Unless an individual is spatially anchored within the nation-state, "the alternative is [therefore] to languish in camps, to live indefinitely off handouts, or to suffer from harassment, round-ups, arbitrary detention, extortion or even deportation" (Kibreab, 1999, p.390). Self-settlement is forbidden in host countries, and refugees are often subjected to public stigma, police harassment and bullying by local citizens. As such, if or when people are forcibly displaced from their countries of origin, the desire to return home may in fact be incessantly powerful.

Unfortunately, the issue of return is far more complicated than a simple yes-or-no debate. What happens when two distinct communities make similar territorial claims to a particular plot of land? In this regard, the Israeli-Palestinian contention offers an excellent point of analysis. The Zionist ideal is symbolic of a collective yearning among the Jewish community for political and religious self-determination, stemming from pervasive anti-Semitic attitudes that have oppressed them as a people throughout history. As such, the fulfillment of Zionism represented an opportunity for Jewish national selfhood to be exercised upon what for them is the Promised Land (Said, 1979). However,

> What has too long been forgotten is that while important European thinkers considered the desirable and later the probable fate of Palestine, the land was being tilled, villages and towns built and lived in by thousands of natives who, for want of knowing better, believed that it was *their* homeland (Said, 1979, p.21, original emphasis).

Although it was known that Palestinians would eventually be displaced from their 'homeland' with the culmination of Zionism, little consideration was made as to what this actually entailed.

At present, Palestinians living in Israel continue to subsist in a perpetual state of marginalization and subordination. Taking into account the general culture of exile that was imposed upon the Palestinians by the Israeli state, Robbins (1983) writes, "the reality… is not what they have lost, but the state of loss itself" (p.70). In a bitter irony, it turns out that the success of repatriation experienced by one community has necessarily led to the seeming impossibility of return or restoration for another. As a whole, there is a common desire

within us to seek permanence of some sort, but is there a place for us all? One writer frames this succinctly: "A million questions but no answers. Palestinians have tried everything. All they wanted was to go home" (El Fassed, 2001, p.438). Another Palestinian refugee shares of how she has resigned peaceably to this seemingly inescapable fate:

> Home could no longer be associated with a country or a land, but with my family and the few people who[m], I felt, preserved an island of humanity and enlightened wisdom in this madness and violence. Ironically, it represented the stability and safety that allowed me to lead an interesting but nomadic life (Habib, 1996, p.101).

For Palestinians, the search for home has become one that is forcibly entangled within the soul, with an inherent longing for home that seems largely non-existent.

REFUGEENESS: PHENOMENON OR PREDICAMENT?

Throughout this paper, our engagement with the refugee figure has predominantly been that of a distant observer. When one probes deeply enough, however, the apparent dichotomy between 'us' and 'them'—that is, non-refugee and refugee—might ultimately not be as distinct as it initially seems; there are possible parallels to be drawn between the 'refugee's experience' and our own (i.e. those of us who are not refugees ourselves). More specifically, this paper poses the question: to what extent are we all entrapped in continual displacement—refugee and non-refugee alike? Quoting Warner (1992),

> We… must realize that the protected home that distinguishes us from refugees is only an illusion. […] We all have a certain homesickness that cannot be fulfilled. No matter where we are, even in our countries of origin, we are all strangers to ourselves… [And categorizing] one group from another… [creates] insiders and outsiders (p.371-372).

In view of the increasing ambivalence of postmodern identities amidst our increasingly globalized era, even people growing up where their families have lived for generations are struggling to establish a firm sense of rootedness in these places. What about people born in exile—what and where is 'home' for them? Many second-generation refugees have found themselves already so settled in a host country that the idea of returning 'home' would seem, in their mindsets, as something inherently irrational. Besides, home may even be a site of violence and oppression, which has historically been the case for many Pakistani and Afghan women.

In Malkki's (1992) words, "to plot only 'places of birth' and degrees of nativeness is to blind oneself to the multiplicity of attachments that people form to places through living in, remembering, and imagining them" (p.38). Although the label of 'refugee' serves an important legal function in providing protection and provisions to displaced individuals, the universal homing desire that is arguably within all of us is demonstrative of the inherent artificiality and rigidity of identities ascribed to notions of citizenship. "In times of rapid changes across the globe, roots [therefore] offer an illusion of stability and purity, and an anchor to hold on to" (Braakman, 2005, p.137).

CONCLUSION

The constructed distinction between refugee and non-refugee—or outsider versus insider—is increasingly blurred by a progressive de-territorialization of identity. It should be realized that the idea of roots, although perceptibly natural and authentic, invariably rests upon inventions and imaginations (Braakman, 2005). Furthermore, national borders are not unambiguous boundaries that divide the world of nations into neat and orderly spaces—many ethnic groups in Africa, for example, do not recognize national boundaries; some may even be officially classified as 'refugees' without leaving their ethnic territories (Hammond, 1999). With regards to whether or not voluntary repatriation as a policy offers a durable solution to the refugee problem, I argue that repatriation, or 'going back in place,' does not always mean returning home. More often than not, the logic of voluntary repatriation fails to scrutinize the intrinsic changes that have taken place to the socio-economic fabric of a country of origin amidst the refugee's period of exile and, as such, propagates what Zetter (1999) calls the "myth of return" (p.1).

Refugees should not be treated as static pawns to be shifted around as dictated by what policymakers deem as desirable or beneficial, which may be in no way reflective of the actual concerns of refugees

themselves. As we have observed in many instances, their ideas of return often differ greatly from that which policymakers apprehend. This calls for a relevant and dynamic approach in seeking to address the global refugee problem. However, in Warner's (1992) words, "the solution to the 'refugee experience' may be more complex, as, indeed, is the solution to our own existence" (p.372). In this regard, it is first essential to recognize how the 'problem' of the refugee has less to do with the loss of home, and more to do with attempts to build a sense of home that is in no way obvious or manifest as such. We must be ready to engage with problems of 'ordering' in our changing world, and to look beyond linear equations of identity and place—that is, country of origin = belonging = home—in order to take up deeper questions pertaining to the relationships of place to movement, identity to place, and identity to movement, at the very least.[3]

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(En) Gendering Peace: Female Agency, Civil Society and Peacebuilding in Liberia

Jennifer Pollock

ABSTRACT – *Structured outside 'official' history, women's experiences in conflict and peacebuilding in Liberia and beyond have often been relegated to the periphery and treated as a "mere indulgence … a blip on the landscape" (Enloe, 2005, p. 280). The realm of grandiose 'official' narratives and political processes – in which male actors maintain a privileged position – both exclude and devalue the voices of active and dynamic female agents. The prevailing androcentrism embedded within narratives of peace and conflict demands a revaluing of women's agency and mobilization in the informal political sphere if positive peace in Liberia is to be realized and (en)gendered. The following endeavours to detail a gendered analysis of Liberia's conflict, creating space for the valuation of dynamic female agency, and addressing the current peacebuilding context and its implications for gender equity.*

RÉSUMÉ – *Structurées en dehors de l'histoire "officielle," les expériences des femmes au sein du conflit et du développement de la paix au Libéria et au-delà sont souvent été reléguées aux périphéries et traitées comme "simples indulgences… un 'spot' sur le paysage" (Enloe, 2005, p.280, translation de la traductrice). Le domaine des histoires et processus politiques "officielles" et grandioses – dans lequel hommes acteurs maintiennent une position privilégié- exclues et dévalue tous les deux les voix d'agents femmes actives et dynamiques. L'androcentrisme dominant implanté dans les histoires de paix et conflit demande une réévaluation du pouvoir et de la mobilisation de femmes dans le domaine politique informel si une paix positive au Libéria est à se réaliser et s'engendrer. Ce qui suit tente à détailler une analyse du genre dans le conflit au Libéria, créer de l'espace pour l'évaluation du pouvoir dynamique des femmes, et adresser le contexte de développement de la paix et ces implications pour l'équité entre les genres.*

INTRODUCTION

Popularized images of women as the victims of war-time atrocities whose bodies endure the injustices of gendered sexual violence, devaluation, and erasure have conditioned the ways in which women are perceived in times of war and peace. Often racialized, such images are particularly applied to the civil wars raging on the African continent, "reproducing and reinforcing the 'African Other'" (Utas, 2005, p. 404) through such detached portrayals. In particular, the Liberian Civil War, a casualty of international strategic disengagement and the personalized politics of 'Big Men,' offers an apt example of gendered peace- and war-time narratives. While often portrayed as victims of 'militarized black male' violence, Liberian women frequently endure symbolic violence through such overarching narratives.

Structured outside 'official' history, women's experiences in conflict and peacebuilding in Liberia and beyond have often been relegated to the periphery and treated as a "mere indulgence … a blip on the landscape" (Enloe, 2005, p. 280). The very treatment of 'feminine' informal politics and narratives as of peripheral interest renders 'official' and apparently 'objective' narratives inherently political, partial, and located. Indeed, by failing to acknowledge the disparate voices of women, male experience is effectively conflated with *human* experience (Peterson, 1992). However, human experience is diverse, multi-vocal, and

infused with disparate power relations of class, ethnicity, and gender-based identities.[1] Significant erasures of feminine voice, action and dynamic agency coupled with a failure to grasp the analytic importance of gender and its social construction have considerable consequences for the understanding of conflict and the efficacy of efforts aimed at a peaceful and enduring resolution. Women have frequently created strategic and emancipatory spaces that need greater recognition, and it is often the strategic utilization of essentialized categories of female identity through which women are able to create space for themselves as females. The following work will endeavour a gendered analysis of Liberia's conflict through creating space for the valuation of dynamic female agency, and addressing the current peacebuilding context and its implications for gender equity.

Even as significant international documents such as the Convention on the Elimination of All Forms of Discrimination Against Women (CEDAW) and UNSC Resolution 1325 have attempted to "operationalize gender equality" (UNIFEM, 2005, p. 5), there remain significant concerns surrounding this realization in the domestic political spheres of conflict-ridden states. Specifically, the prevailing androcentrism embedded within narratives of peace and conflict demands a revaluing of women's agency and mobilization in the informal political sphere if peace in Liberia is to be realized as *positive* and (en)*gender*ed[2].

Widely known as "Liberia's 'Iron Lady'" (BBC, 2005, p.1) and celebrated as the first elected female head of state on the African continent, Ellen Johnson-Sirleaf and her political victory signalled to many the emergence of a long sought-after institutionalization of female leadership and voice. As an African woman who successfully sought inclusion into the 'official' peacebuilding narrative, Johnson-Sirleaf's electoral success communicated the possibility of female engagement beyond victimization and sexualized militancy. However, even while challenging popular conceptions of gender and female capacity, her presidency cannot tackle the peacebuilding project in isolation from the radical female politics that have taken shape in civil society to contest pervasive and gendered exclusion.

*HIS*TORICAL MARGINALIZATION: THE ROOTS OF CIVIL WAR

Liberia's civil war must be understood as dynamic and rooted in complex, gendered histories. While authors such as Reno (2004) and Adebajo (2002) privilege conditions of Samuel Doe's post-coup leadership as the source of conflict, it is important to place the historical construction of the Liberian state at the centre of a preliminary analysis. Reno contends that the "*real* origins of the war are found in the collapse of Liberia's government" (2004, p. 116, original emphasis). This is an argument supplemented by Adebajo, who offers the following complicating factors: i) a failing security environment; ii) a divided Economic Community of West African States (ECOWAS); and iii) the "reduced strategic value of Africa" (2002, p. 44) in the post-Cold War international environment. While all of these factors are essential, I argue that a more holistic understanding of Liberia's civil war additionally demands a gendered analysis.

Masculinity and Sexual Conquest: Liberia's Colonization

While academics and independence movements have long highlighted the racism and ethnocentrism of colonization across the world, feminist theorists examining gender dynamics across various contexts have also suggested that "manhood and colonization are inseparable" (Dorsey, 2000, p. 78). Indeed, in the context of Liberia's own colonization— a process, occurring in the 1820s, through which the ACS recruited the freed black slaves of the American north to emigrate to West Africa in order to "resolve the dilemmas of slavery, race, and free African Americans" (Dorsey, 2000, p. 78) – constructions of masculinity were strongly linked to processes of domination. While presented as a philanthropic gesture to repatriate the African Diaspora,

1 Oyeronke Oyewumi argues that West African identities "confound Western gendered understanding" (2002, p. 8), because "women, gender, and sisterhood [are] only intelligible with careful attention to the [Western] nuclear family from which they emerged" (2002, p. 3). However, theorists like Thomas argue that while 'woman' as a social category may have developed through colonial interaction in many diverse locales, this does not mean that "the anatomic distinction between bodies that are capable and incapable of reproducing … was free of gender[ed] associations" (2007, p. 57). Indeed, gender must be understood as a contested and historically contingent concept and Oyewumi (2003) herself states in a later publication that "we cannot discount the growing presence of gender consciousness [in Africa]" (p. 2).

2 By using the terms 'positive' and 'engendered' here, my intention is to invoke (and fundamentally intertwine) a double meaning: to refer to the importance of creating and sustaining positive peace *as well as* ensuring this is done in a way that challenges exclusionary gender norms. Aiming not only to end violence, the concept of a *positive* and (en)gendered peace demands a re-centring both of gender as an analytic concept and of women's informal political organizations as key actors in a participatory dialogue on patriarchal violence. Emphasizing social justice, durability, inclusivity, and an acknowledgement of a gendered framework of analysis, (en)gendered peace is fundamentally about the crafting and consolidation of a peace which recognizes that an end to physical conflict alone is insufficient in ensuring that peace is both sustained and equitable.

the colonization of Liberia for African-American settlement was intimately tied to fears of 'race mixing' and pervasive sexualizations of the African continent. The ACS's colonization and migration movement offered men the opportunity for the "manly expression of piety in a feminized religious culture" (Dorsey, 2000, p. 82), creating a social space for men to enact and define their masculinity through notions of Christianity, race, and nation.

African-Americans – the 'objects' at the centre of this movement – were often structured as emasculated. Frequently portraying black American men as 'feminized' from years of slavery and racist domination, white ACS elites assumed that mass emigration would "make men" (Dorsey, 2000, p. 84) out of former slaves through the sexualized "penetration of the West African interior" (Dorsey, 2000, p. 86). By engaging in their own hyper-masculinized conquering of a territory and people, black men would essentially 'become male.' In this way, the origins of state formation through the establishment of the Commonwealth of Liberia in 1838 have been intimately tied to colonial and male-centric narratives of exploitation. The "caste-like [and] exclusionary" (Tuttle, 2003, p. 2) nature of this Americo-Liberian dominated political system may arguably be rooted in a broad discourse of racialized and gendered exploitation. Processes of colonization that depict Africa as a feminine object of "masculine sexual conquest[,] panting for the spread of civilization's seed" (Dorsey, 2000, p. 86) reify Manichean civilization-based binaries as well as gendered scripts of sexual exploitation. The colonial domination of Liberia and its inhabitants was constructed as a sexual exercise of domination desired by the continent's inhabitants. These male-female, colonizer-colonized, civilized-savage dichotomies structured the exclusionary political agendas of state formation and 133 years of Americo-Liberian governance.

Re-imagined Masculinity and the Cold War in Doe's Liberia

Conditioned by the social exclusion of preceding governments, the 1980 Doe Coup "did not fundamentally alter the political oppression … the only 'change' was the loss of Americo-Liberian suzerainty" (Toure, 2002, p. 7). Both brutal and divisive, Doe utilized national institutions such as the Armed Forces of Liberia (AFL) to maintain his personal control over the state. Doe turned the AFL into an "instrument of oppression" (Adebajo, 2002, p. 45) in order to perpetuate his hold on state power. The appropriation of state resources and the weakening of Liberia's economy and state institutions also remained favoured techniques of Doe's personalized rule. In order to check the rivalries of competitors, Doe armed competing warlords and encouraged the construction of private combat forces, "hastening the collapse of Liberia's state institutions" (Reno, 2004, p. 118).

This militarization of political power is intimately related to the broader Cold War context, which also relied on pervasive insecurity and constructions of masculine identity and nationality (Enloe, 1993). In this way, much like the conquests of colonialism, the exclusionary militarization of the Cold War was largely predicated on constructions of masculine posturing and identity creation. While the substantive content of such Cold War constructions of male identity are highly variable cross-culturally, Enloe (1993) argues that the international context of the Cold War created a general masculine framework in which violence became a privileged facet of the militarized male subject. Implicated within this grand scheme, Liberia's attempts to negotiate the power dynamics of a gendered international system are marred by political exclusion.

By "condoning the blatantly rigged" (Adebajo, 2002, p. 45) Doe elections, the United States used Liberia to strengthen its Cold War position much as it had employed the ACS and colonial diaspora migration to Liberia as a means to resolve its domestic racial quandaries. In both frameworks, the Liberian state itself became a female subject to be exploited within the larger scheme of international relations and international conflict. Attempts by Western feminists to 'revalue' the feminine illustrate the systemic social construction of females as the undervalued half of a gender binary and the ways in which these constructions were internationalized, applied through colonization to international locations. Even as social constructivist theory emphasizes that the feminine is in no way 'naturally' the lesser half of pervasive gender dichotomies, it is nonetheless accorded less value through processes of domination and discursive naturalization.

The eventual decreasing strategic value of this small West African state near the end of the Cold War further illustrates the unstable position of the feminized subject within international affairs. Due to its decreasing strategic importance as a political ally, Liberia was increasingly seen as an undesirable international partner of the United States; the "oxygen [of American support] that kept dictatorship alive and well in Liberia" (Toure, 2002, p. 8) waned significantly during the Doe regime. Consequently, through a combination of economic collapse, pilfered institutions, "collapsing avenues for peaceful dissent" (Adebajo, 2002, p. 45) and a reduction in international strategic value, Doe's regime – and the Liberian state more generally – grew increasingly destabilized.

Exploiting power vacuums created by Doe's failed regime, the Charles Taylor-led National Patriotic

Front of Liberia (NPFL) emerged from the Cote D'Ivoire border to officially incite Liberia's 14-year civil war. Followed by the United Liberation Movement of Liberia for Democracy (ULIMO) factions – which later split into ULIMO-k and ULIMO-j respectively – Liberia's civil war soon became a factionalized competition for state resources and personalized political power. While Doe's violence provided some motivation for initial conflict, the birth of the civil war was largely lacking in revolutionary zeal, "based more on [Doe's] personal expediency than political ideology" (Adebajo, 2002, p. 47). Pilfering and profiteering from the exploitation of diamond mines, timber resources and the pervasive war economy provided the central motivation for continued conflict.

Structured by discontent and relations of power, conquest, and rule, the Liberian conflict cannot be separated from the ways in which it has been significantly gendered. Whether within the context of ACS colonization, True Whig exclusionary political rule, or the violently destructive Doe regime in which pillaging and militarization were increasingly normalized by Cold War ambivalence, the roots of Liberia's civil war seem to consistently rest within highly gendered relations.[3]

FEMALE MOBILIZATION: AGENCY DESPITE STRUCTURAL INEQUITY

Just as 'gendering' the Liberian conflict is important in order to understand the 'roots' of civil war, engaging with constructions of 'masculine' and 'feminine' are also crucial for the revaluing of human agency. Gendered "structural imbalances and pervasive cultural barriers to female empowerment" (Sawyer, 2004, p. 106) remain testaments to the large-scale victimization of many women in Liberia. Specifically, rape, violence, and wide scale victimization of females took a specifically militarized shape and zeal as a "celebration of a hyper-masculine warrior identity … [in which the] denigration and objectification of woman-as-sex" (Bowker & Dilorio in Utas, 2005, p. 418) became normalized. Treated as the "booty of war" (Utas, 2005, p. 415), women and their victimization have increasingly been implicated as a consequence of civil conflict. However, this narrative of 'woman as victim' is operational only in a very limited fashion, as it fails to critically engage with the dynamism of female agency in Liberia. Indeed, the revaluation of female identities and capacity to challenge oppositional forces and re-imagine action in strategically important ways remains necessary in the context of Liberian conflict and peacebuilding.[4]

Beyond Women as Peacemakers

Feminist theorists like Utas (2005) argue that essentialized words like 'victimhood' and 'agency,' while often constructed as oppositional, must be collapsed in order to engage in a more comprehensive analysis of female coping strategies. Interestingly, however, it is through the strategic utilization of such essentialized categories of female identity, such as 'mother,' 'peacemaker' and 'sexualized warrior,' that women are able to create space for themselves as females. While it is important to demystify such essentialisms, the capacity of women to strategically employ each identity facet becomes a source of female power and agency in contexts where formal power is denied to women who attempt to engage in 'official dialogue.' By accounting for women's informal roles, the metanarratives of history and international relations are problematized, demanding that space be made for the valuation of gender as an important analytic concept and framework of analysis. Contesting the "reductionist portrayals of women in war zones as merely the passive victims of conflict" (Utas, 2005, p. 403), the following section explores the ways in which women employ essentialized categories in strategic ways in order to complicate the existing treatment of gender and its implication in peace and conflict in Liberia.

Strategic Essentialism

Originally conceived by the post-colonial and feminist cultural critic Gayatri Spivak (1987), "strategic essentialism" (p. 221) refers to the capacity of groups to appeal to naturalized categories of difference to suit the strategic requirements and particularities of a given situation to further political ends. In this way, women as a social group manipulate essentialist categories often associated with their gender in strategically beneficial

3 While Western powers proclaimed the 'end of the Cold War' following the dismantling of the Berlin Wall, it is clear that for Liberia (as for much of the colonized world implicated in the proxy ideological battles and politicized regime propping), conflict had really only begun. Liberia became ravaged by conflict and drawn into battle by Nigerian strategic interests and spoilage, while incursions of Economic Community of West African States Cease-Fire Monitoring Group (ECOMOG) forces failed to quell the violence. By 1994 over seventy-five percent of Liberia's population had been "internally displaced (1.2 million), made refugees (750,000), or […] killed (200,000)" (Reno, 2004, p. 122). Rather than a clear finality, "the Cold War [had] a multitude of endings" (Enloe, 1993, p. 3) in which conflict and insecurity continued to rage in Liberia despite the formal cessation of international conflict.

4 Indeed, even during the racialized and gendered National Emigration Convention of the early 19th century black women attempted to carve an independent place for themselves. Prominent activist Mary Ann Shadd joined the emigrationist leadership to assert her own political ideals and contest gendered notions of independence implied by the colonization of Liberia (Dorsey, 2000).

ways. While arguably reinforcing stereotypical conceptions of gender roles and norms, the utilization and exploitation of essential categories is often a means of social and political survival with immense strategic value for women.

Arguably one of the most potent essentialist ideals (both in the Liberian cultural context and political contexts more generally), appeals to 'motherhood' – and their militant manifestation in Liberian peacebuilding – illustrate the strategic importance of essentialized identities. Ruth Perry, a prominent female peace activist opposed to the rule of Doe and Taylor who eventually became the Chair of the Interim Government of National Unity (IGNU) in 1996, utilized her identity as mother to gain political support. Claiming that "as a mother she would be a stabilizer for her male [warlord] counterparts" (Kelley, 2002, p. 171), Perry employed a self-sacrificing, maternal ideal to contest prevailing male militant dominance. It was largely through the utilization of this identity that Perry came to demand both respect and acknowledgement. Indeed, this propensity for discipline was duly drawn upon in illustrating her capacity as peace builder by "sending Taylor's guards away … [and prompting the remark] Chairwoman Perry…you have a mother's authority…when you exercise it fairly all the children will know it" (T. The in Kelley, 2002, p. 163). Ruth Perry's leadership and strategic employment of the essentialized identity of 'mother' ensured momentary stability. Indeed, the effectiveness of her approach continues to structure the efforts of civil society groups – with the leader of one such group proclaiming, "the faction leaders, they are children to us" (AFPSG, 2004, p. 13). Even Liberia's new president declared her wish to "bring motherly sensitivity and emotion to the presidency" (BBC, 2005, p. 2) in order to facilitate national healing.

While the idealization of women as benevolent mothers may facilitate the portrayal of women as 'natural peacemakers,' it is also clear that alternative essentialized identities have enabled women to contest gender inequity within situations of conflict. Highly sexualized female combatants, such as Colonel Black Diamond of the Women's Auxiliary Corps (WAC), actively participated in the looting and violence characteristic of the civil war and received such gendered media portrayals as "sleek … stylish [with] polished fingernails and a bevy of supporting beauties" (Utas, 2005, p. 405, 404). Whether building business enterprises from their pilfered war wealth or becoming a soldier to guard against the dangers of rape and "take revenge" (Taylor, 2006, p. 1) on behalf of all the Liberian women who have endured gendered violence, many women have used a more militant female identity to contest or benefit from the prevailing violence and conflict.

Gendered Peacebuilding

Through valuing the dynamic strategic employment of identities by women and civil society groups centered on gender, a greater understanding of women's role in peacebuilding may emerge.

While theorists such as Cousins et al. (2000) argue that peacebuilding should not be "equated to the entire basket of post-war needs … [and should maintain] a strategic focus on conflict resolution" (p. 10), it is generally privileged male actors who get to decide what belongs 'in the post-war basket' and peace deals. Women are "woefully underrepresented in most political mediation processes" (AFPSG, 2004, p. 35) and for this reason the Liberian peace process must revalue their informal contributions as essential if the process is to be substantively gendered and applicable.

Civil Society and Multilevel Synergy: Reimagining Gendered Political Action

In working to foster "processes through which citizens, specifically women, can articulate their interests" (INSTRAW, 2000, p. 3), it becomes essential to broaden peacebuilding beyond exclusionary political processes, enabling the possibility for gendered and sustainable positive peace to emerge. While Lederach (1998) argues that top-level leadership (composed mainly of esteemed leaders) and grassroots leadership (composed of community leaders) are each essential in ensuring an enduring peace, he contends that 'middle range' of leadership, composed largely of non-governmental organizations (NGO), possesses the "greatest potential" (p. 60) for its applicability in addressing issues of gender and representation. However, it is important to move beyond "false binaries of top v. bottom leadership" (Carter, 2006), especially given the large-scale exclusion of women's 'critical-mass' participation at the upper levels of leadership, and revalue the contributions of civil society.

Nevertheless, concerns remain about the privileged positionality of NGO participants, their representational authority and the risk of co-optation involved in mainstreaming gender equity agendas. Often understood as the "realm and range of voluntary and autonomous associations in the public sphere between the family and the state" (Toure, 2002, p. 6), theorists such as Julius Nyang'oro and Stephen Ndegwa, in their analysis of African contexts, have argued that civil society should not be conceptualized as a naturally

benevolent, empowering, or democratic sphere (Toure, 2002). It must be acknowledged that Liberian civil society has "not been uniformly progressive" (Toure, 2002, p. 7) in supporting women and other marginalized community members in articulating their needs and ideas in the peacebuilding process. Indeed, many groups that are extremely dependent on outside international financial resources have "not been well grounded in local communities" (Toure, 2002, p. 24) and some NGO staff has even been implicated in the "sexual exploitation of girls and women in refugee camps" (UNIFEM, 2005, p. 8).

Generally speaking, however, many constituent NGO groups within Liberian civil society have played a critical and positive role in creating space for the valuation of women's political activities. Indeed, as will be detailed below, much of Liberia's gender-based equity movement has been significantly community-based. Thus, while some elite women's voices have undoubtedly been given more space, it should be recognized that civil society has been an essential element in women's mobilization and conflict resolution.

Liberia's Civil Society Peacebuilding

In striving for gender equality and peace, civil society has formally facilitated advocacy programmes, civic educational initiatives and relief services, as well as making significant informal contributions to peace negotiations with factional leaders. Primarily due to the role of the Inter-Faith Mediation Committee (IFMC) in orchestrating mediation talks in Freetown and its subsequent modelling of the 1990 ECOWAS Banjul agreement, civil society NGOs can be said to have played a significant role in mediating Liberia's conflict (Jusu-Sherriff, 2004). Playing an active role throughout the 1989 – 1996 conflict, and the following intermittent period of negative peace that characterized Taylor's post election rise as leader of the National Patriotic Party (NPP), the IFMC advocated for greater civil society inclusiveness. These critical engagements often involved overtly challenged the way that peace agreements (such as Abuja[5]) rewarded gun-wielding factional leaders with political positions and "unwarranted legitimacy" (Jusu-Sherriff, 2004, p. 271). However, it was the work of a consortium of women's groups that demanded and eventually won a place at the peace negotiation table as official observers during the 1994 Accra Clarification Conference (Jusu-Sherriff, 2004; AFPG, 2004). After the failure of the Akosombo meetings of that same year to secure peace, strong opposition by women's NGOs increased pressure for their inclusion in the Accra Conference.

Motivated by both the regionalization of conflict and spoilage by Taylor within Sierra Leone, Guinean, Sierra Leonean and Liberian women united through the formation of the Mano River Union Women's Peace Network (MARWOPNET) in early 2000 to contest the intractable and increasingly gendered violence throughout the region. Becoming "increasingly involved in conflict management" (IPC, 2002, p. 4) the MARWOPNET delegation secured regional peace talks and eventually convinced Taylor to rescind his expulsion of Sierra Leonean and Guinean ambassadors, as well as to provide greater female representation at the signing of the Comprehensive Peace Agreement (CPA) in Accra (AFPSG, 2004).

Civil society demonstrations – often of women clad in white, demanding the cessation of hostilities and immediate disarmament – grew exponentially as a peacebuilding strategy. These culminated in demonstrations at the U.S. Embassy in Monrovia, demanding immediate intervention by the U.S. Less than two months after women's heightened demands and demonstrations for peace, the United Nations Security Council (UNSC) authorized a multinational force, through Resolution 1497, for 15,000 United Nations Mission in Liberia (UNMIL) forces to work to quell the growing instability of this period. Despite MARWOPNET's prominent role in the consolidation of the Accra CPA talks, even "hastily organized" (Reno, 2004, p. 138) gendered violence on the streets of Liberia increased in a "frenzy of rape … with females seen as 'booty' to be taken before the arrival of peacekeepers" (AFPSG, 2004, p. 51). In response, women engaged in public demonstrations to decry the carnage of military factions amidst the consolidation of the 2003 peace agreement (Zangar, 2003). Similar to how the cessation of formal Cold War violence did not preclude increasing violence in countries marred by proxy wars, emerging deals for peace initially fanned the fires of gendered violence.

While women's inclusion in the peacebuilding process could not singularly ensure its success nor guard against its dismal failure, it is clear that "peace pacts limited to agreements among armed combatants are unlikely to generate the ties of reciprocity between rulers and citizens" (Reno, 2004, p. 136). As Hunt and Posa argue, "women are crucial" (2001, p. 38) to both peacebuilding and the maintenance of human safety because of their influential role in informal political movements. Whether through assertions of strategic essentialism or grassroots political demonstrations, women have "played an important role in ending Liberia's civil war" (Jusu-Sherriff, 2004, p. 271).

5 The peace agreement negotiated in Abuja, 1995, "accepted key insurgent leaders as interlocutors" (Reno, 2004, p. 124) followed by a peacebuilding process widely regarded as "fake" (Ali & Matthews, 2004, p. 11) due exploitation by Taylor's ruling party.

PEACEBUILDING LEADERSHIP: MAINSTREAMING GENDER

While imagined as a new era of gender consciousness and equity much needed after the war ravaged the region and state, the political victory of President Johnson-Sirleaf in the CPA elections must be contextualized within the broader Liberian conflict and struggle for peace. Johnson-Sirleaf's electoral victory has eclipsed neither the importance of women's informal political mobilization, nor the prevailing context of gender inequity and androcentrism. Indeed, when Johnson-Sirleaf asked President John Kufuor of Ghana whether he took issue with her female presidency, he remarked, "I don't consider you a woman" (Hartill, 2005, p.1).

Rather than encouraging a reconceptualization of what it may mean to simultaneously be female and a political leader, Johnson-Sirleaf was effectively denied her female positionality. Indeed, as Amirta Basu's study of party politics and gender suggests, "parties draw on women as individuals, not as members of a group that has suffered discrimination" (in Jones, 2006, p. 1). In this way, the intersectional and modulated identities of female leaders must be fundamentally acknowledged as enacted within a larger systemic framwework if gender inequity is to be substantially addressed. Specifically, mainstreaming gender within the peace process requires a consideration of women's multifaceted needs and roles in each step of the process, with innumerable critical issues in need of immediate attention. From female literacy rates well below male averages to unstable economic conditions that exacerbate existing feminized poverty rates, there is no shortage of required action. Although two issues of critical concern— i) disarmament, demobilization, and reintegration (DDR); and ii) mitigating sexual violence— have been acknowledged in government policy, poor institutionalization and an insignificant financial resource base have hampered the capacity of NGOs to make gendered DDR and sexual violence key foci of the Liberian post-CPA government. The International Crisis Group (ICG) argues that intrusive international fiscal requirements placed on the Liberian government, such as the Governance and Economic Management Assistance Plan (GEMAP), out of concern for corrupt mismanagement of reconstruction funds, constitutes a "heavy price for any government to pay…endangering the entire reconstruction and peacebuilding process" (ICG, 2006, p.1). While outside the scope of this paper, it is clear that issues around failing international donor support pose critical problems for Liberian security.

Disarmament, Demobilization, and Reintegration (DDR)

DDR has long been of central concern for gender-based civil society groups in Liberia. Even during the tenuous period of peace following the 1993 Contonou Accord, women campaigned for the disarmament of militant factions, raising funds to buy and destroy weapons (UNIFEM, 2005, p. 2). Many women felt that past failures to disarm had exacerbated existing conditions, arguing "if disarmament had taken place in 1994…we wouldn't have had April 6, 1996 (when fighting reached Monrovia)" (UNIFEM, 2005, p. 2).

When plans for DDR were finally realized following the 2003 CPA, women were given formal priority as per UNSC resolution 1325. This resolution emphasized the importance of women's active participation and the necessity of addressing concerns particular to female combatants. However, even while women had comprised an estimated 20% of civil war combatants, only "one out of 25 of DDR beneficiaries were female" (UNIFEM, 2004, p. 13). The failure to formally engage women arose out of "gross underestimations" (UNIFEM, 2004, p. 12) of initial DDR targets, with a gap between actual participants and women targeted by government programmes of more than six thousand female combatants. Women often preferred to give their guns to men amidst rumours that women were "told to stay away" (UNIFEM, 2004, p.15) from disarmament sites; this, coupled with the pervasive sexual assault of women within demobilization camp sites left women facing significant barriers to participation in the DDR programme.

In terms of women's participation within the emerging post-war national armed forces, attempts to integrate women need to be given greater priority than was previously accorded to the 'gendering' of the DDR process. Officially, Liberia is "looking for an army that would have at least a 20 percent female component" (Dukule, 2006, p.1) However, in order to participate within the army, body applicants to the officer corps are expected to have at least completed a high school education and preferably to have obtained post-secondary degrees (Dukule, 2006). Given the lower literacy levels among females and the prohibitive cost of education – which has motivated many young women to engage in "sexual transactions to pay for schooling" (Jones, 2006, p. 2) – this military requirement is often significantly unattainable for interested females, and takes out

their potential (and arguably necessary) contribution to the stability of the larger post-conflict Liberian state.[6]

Combating Sexual Violence

The prevalence of lawlessness has the capacity to cultivate a disproportionately insecure situation for Liberian women, who are especially vulnerable to gendered violence. Given the history of women's sexual exploitation during the 14-year civil war and increasing insecurity on Liberian streets in the present 'post-conflict' situation, there is great potential for the re-ignition of pervasive sexual violence. Specifically, post-civil war incidents of rape, not just their reporting, are actually "rising in number" (UNIFEM, 2003, p. 8).

Even as Johnson-Sirleaf pledged to make sexual violence a central concern for her government and its peacebuilding efforts, prevailing institutional difficulties have made prosecuting sexual criminals an exceedingly difficult process. The failure to prosecute perpetrators of sexual violence during the period of civil war illustrates the court's institutional failure to make women's safety a significant concern. The Females Lawyers' Association and Johnson-Sirleaf, in an example of civil society-government collaboration, have worked together to pass legislation to make [single perpetrator] rape illegal "for the first time in Liberia – previously only gang rape was considered a crime" (IRIN, 2006, p. 1). However, according to a UNMIL report, the law has largely been ignored by both the police and the judiciary (IRIN, 2006). Forced – often by poverty – to settle cases outside of a weakened and uncooperative legal system, women are increasingly accepting informal cash settlement from rapists, who escape with legal impunity (IRIN, 2006).

Despite the actions of civil society and President Johnson-Sirleaf, institutional weakness continues to place gendered priorities and greater peacebuilding initiatives at risk. Clearly, while female agency – in all of its dynamic and strategic importance – has played a significant and essential role in ensuring the development and success of the CPA, the lack of a supportive institutional framework makes it unclear whether sexual violence will be significantly challenged by the Liberian state, particularly in the short term.

CONCLUSION

Through a gendered analysis of Liberia's civil war, the dynamism of Liberian women's agency and present potentialities for peace, it is clear that the failure to apply a gendered analysis risks a serious misrepresentation of male-centric narratives as 'official' and 'objective.' With a history of colonial settlement, exclusionary governance, and post-conflict institutions that were unable to address the concerns of women, the Liberian state is greatly implicated within gendered systems of disparate power relations. However, this history must be considered relationally with the significant efforts of gender-based civil society organizations and their creation of gendered spaces. Rather than simply the result of Cold War politics, ethnic animosity, or a pervasive field of competition within economic and political spheres, the Liberian conflict is one that emerges out of a complex and dynamic system of power relations.

Contextualized within the international environment and the creation of significant documents like CEDAW and the UNSC's Resolution 1325 (which are designed to enhance the position of women within peacebuilding efforts), it is clear that the necessity of an (en)gendered peace extends well beyond Liberia's borders. While a consciousness regarding gender dynamics and its inclusion within peacebuilding remains a normative priority for international institutional actors, significant concerns linger surrounding this realization. Peacebuilding that prioritizes gender equity must revalue the importance of women's informal political contributions. Excluded from formal processes, the contributions of women through gender-focused avenues of civil society must be acknowledged. Existing structures must move beyond the mere *accommodation* of women and instead ensure that gender is incorporated into the very fabric of the institutions and processes of peacebuilding.

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6 Additionally, given the increasing prevalence of roaming gangs of robbing and machete-wielding 'Issaka boys,' who "hack their victims to death" (Rennie, 2006, p.1) and are largely excluded from formal military participation by educational requisites, Liberia's security situation is under severe risk. Indeed, at the urging of the Liberian Justice Ministry in light of "police inability to decisively deal with" (Rennie, 2006, p.1) the activities of these criminal groups, vigilante community committees have been formed to ensure human security. As a result, the prevailing military educational requisites disproportionately discourage the participation of both women and youth, at the peril of Liberia's larger security framework.

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India's Food Policy Paradox

Julia Buchan

ABSTRACT – *This article uncovers the responsibility held by the Indian Central Government for causing the paradoxical and deeply problematic situation that has arisen within its food policy. The procurement of foodgrains by the Food Corporation of India (FCI) intended for allocation through the Public Distribution System (PDS) has consistently been increasing above required levels while millions of citizens continue to suffer from food insecurity. The root of this problem lies predominantly in unjustifiably high government-induced Minimum Support Prices (MSPs) that have been unfairly imposed upon foodgrain producers. This absurd situation of overflowing grain warehouses has placed undue stress on the PDS, resulting in inappropriate reform, reduced off-take and increased food insecurity. This paper upholds that the MSP must revert back to its original function—that is, where procurement is equal to off-take, instead of its current function as a farmer support scheme—if food security within India is to be realized.*

RÉSUMÉ – *Cet article révèle la responsabilité tenue par le Gouvernement central indien pour avoir causé la situation paradoxalement et sévèrement problématique qui est survenue dans sa politique alimentaire. L'approvisionnement de céréales alimentaires fournit par l'Entreprise alimentaire indienne (FCI) avec l'intention d'être distribué à l'aide du Système de distribution publique (PDS) s'est constamment augmenté au-delà des niveaux requis pendant que des millions de citoyens continuent a souffrir de l'insécurité alimentaire. L'origine de ce problème se trouve principalement dans des Prix de support minimum (MSP) causés par le gouvernement qui sont injustifiablement hauts et qui ont été injustement infligés sur les producteurs de céréales alimentaires. Cette situation absurde d'entrepôts remplis à ras bord de céréales a causé du stresse inutile sur les PDS qui a résulté en une reforme impropre, la réduction des prises et des augmentations dans l'insécurité alimentaire. Cette rédaction insiste que le MSP doit retourner à ses fonctions originaux – c'est-à-dire, où l'approvisionnement est égal aux prises au lieu de ses fonctions actuelles comme plan de support de fermiers – si la sécurité alimentaire en Inde va être réalisée.*

India has undeniably made considerable advances toward food security since the 1960s. Due to the agricultural success of the Green Revolution and favourable weather conditions, India is now self-sufficient in foodgrains (rice and wheat) and has been a net grain exporter since 1998 (Hanumantha Rao, 2005). Additionally, the Food Corporation of India (FCI) has acquired over three times the necessary amount of foodgrains needed for buffer stocks and the Public Distribution System (PDS) (Hanumantha Rao, 2005). Food security is defined by the Food and Agriculture Organization as a condition "…when all people, at all times, have physical, social and economic access to sufficient, safe and nutritious food which meets their dietary needs and food preferences for an active and healthy life" (FAO, n.d.). Despite the available foodgrain to guarantee food security to all its citizens, however, access to these supplies for many of India's citizens is still greatly restricted. For this reason, the country's food security system has recently come under intense scrutiny. Regarding India's current food policy, the food security system and the price policy together consists of three main instruments: i)

procurement prices/minimum support prices (MSPs); ii) buffer stocks; and iii) the PDS (Mahendra Dev, 2005). The over-accumulation of grain by the FCI can primarily be attributed to an exorbitantly high MSP as well as recent changes within the administration of the PDS. Improving Indian food security at the household level for millions who are still suffering from malnutrition is an issue of great importance. The paradoxical outcome of rising foodgrain stocks amidst an increasingly food-insecure population is therefore indicative of a deeply problematic food policy in desperate need of reform.

As of May 1, 2002, the public buffer stock of foodgrains reached 62.66 million tonnes – however, close to 260 million citizens remained below the poverty line (Mahendra Dev, 2005). Regardless of this sharp rise in procurement, the central government has been unsuccessful in achieving country-wide food security. In order to ensure remunerative prices to farmers, the government of India has been intervening since the mid-1960s through its MSP and foodgrain procurement policy. The central government offers price support to paddy, coarse grain and wheat producers through the FCI and State Agencies. All the foodgrains covered under the scope of its prescribed terms are offered for sale throughout the country (primarily in fair price shops), which are then purchased by the public procurement agencies at the MSP. This has been an effort to ensure: i) stability against bumper harvests or below-normal production; ii) guaranteed prices to producers; iii) reasonable prices for consumers; and iv) food supply at subsidised rates to vulnerable populations (Chand, 2005). Foodgrain producers have the freedom to sell their grains either in the open market or to FCI/State Agencies at the MSP, in order to maximize profit (Department of Food and Public Distribution, n.d.).

Excessive procurement is a relatively new phenomenon beginning in 1999. Annual procurement in the 1990s was around 24 million tonnes per year until 1999, after which it rose to 31 and 26 million tonnes in 2000 and 2001 respectively (Hanumantha Rao, 2005). The additional procurement in these two years raised the stocks of the FCI by 19 million tonnes, which has had many negative effects on India's food security. For example, the increase of grain procurement above the FCI's carrying capacity inevitably entails an increase in the operational costs of the PDS. Furthermore, the government's attempt at reducing the food bill has resulted in the exclusion of many individuals—that is, specifically those who remain in great need of assistance—from qualifying for access to foodgrains under the PDS. These and several other negative impacts will be discussed further in this paper, together with the argument that the steep rise in the MSP is predominantly responsible for the current excessive stock accumulation.

The MSP is fixed by the Indian government and is supposed to reflect the recommendations of the Commission on Agricultural Costs and Prices (CACP). The MSP should ideally be at a level where the procurement by the FCI and the off-take[1] from it through the PDS are balanced. By definition, the MSP should act as a floor price, below which farming becomes unviable and whereupon purchase by the FCI is necessary. The CACP bases its recommendations on several factors such as: a) the emerging balance between domestic foodgrain supply and demand; b) the prospects for technological change; c) the need to ensure agricultural resource efficiency through the diversification of cropping patterns; and d) price movements in relation to the cost price of agricultural inputs both within the national and international market (Hanumantha Rao, 2005).

However, the implementation of inappropriate policy has caused differentiation between food policy rhetoric and reality. The Indian government has consistently ignored advice from the CACP, instead setting the MSP in great excess of recommendations in order to satisfy the demands of producers. Subsidy-driven agricultural policies have helped big farmers, who have increased their political influence across parties at the state and national government levels. In addition to this, vocal lobbying among farmers has been able to influence the MSP policy in insisting that all types of farm expenditure, including incurred and imputed, should be added to the cost of production in calculation of the MSP (Mahendra Dev, 2005). As such, the MSP has surpassed open market prices (Goyal, 2002). This has resulted in an increased procurement by the FCI – one that is far beyond its targets and carrying capacity. In this sense, rather than acting as a support price to ensure minimum production by farmers, the MSP can more accurately be classified as a procurement price.

This unfavourable outcome has applied especially to the case of wheat, where there was a 25 percent rise in the MSP between 1997 and 1998. Since this time, the MSP for wheat has risen by 53 percent, while the MSP for rice has risen 34 percent over the same period (Hanumantha Rao, 2005). In the presence of continually escalating MSPs, private trade in the open market becomes increasingly unprofitable. In the case of wheat and rice, it is therefore probable that escalating MSPs have discouraged private trade and in turn furthered the increase in procurement of the FCI due to their obligation to purchase all stocks that are offered to them by producers.

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1 The amount of FCI procured foodgrain designated for use under the PDS.

Escalating MSPs have also discouraged open market exchanges. Private traders are discouraged from increasing their own stocks due to the fact that higher market prices have reduced the prospects for off-take, thereby raising the sales of the FCI (Hanumantha Rao, 2005). Up until the mid-1990s, private trade of foodgrains in India accounted for approximately 30 to 40 percent of the marketable surplus (Mahendra Dev, 2005). It is therefore very likely that a large portion of the stocks now held by the FCI are those which would normally be held by private trade if procurement and market prices were aligned with supply and demand. Despite rhetoric of marketization and privatization, the private sector is being crowded out of the market by the government. The current MSP distortion has led to an increase in buffer stocks far beyond their sustainable level, and is further aggravated by the disincentive of farmers to sell in the open market.

The High Level Committee (HLC) on Long-Term Grain Policy—set up by The Ministry of Food and Public Distribution in 2001 to address issues of food security—concurred that MSPs should be maintained. They cite MSPs as having been critical to India's success in achieving foodgrain self-sufficiency, but admit that MSPs are currently distorted and in need of reform (Swaminathan, 2002). The MSP must cease to act as a farmer support scheme, and must instead revert back to its original function where the procurement by the FCI and the off-take from the PDS are balanced. The committee has recommended that MSPs be fixed strictly upon the recommendations of the CACP, claiming that by assuring procurement or purchase of grain at the announced MSP, the government would thereby ensure an adequate return to cultivators (Swaminathan, 2002). It is clear that the Indian government must stop inflating this price in order to reduce excess grainstocks; during the time of transition, the FCI should also consider restricting the amout of grain it procures. Only with these changes can the complementary roles of the MSP and PSP be restored.

Increases in the MSP and in the resulting procurement are linked to inappropriate PDS reforms which have also had adverse effects on India's food security due to inappropriate PDS reforms. These reforms can be at least partly attributed to increased grain procurement by the FCI and, in a cyclical process, have resulted in reduced off-take while further contributing to overflowing foodgrain warehouses. These changes include who is eligible and for how much foodgrain through the PDS. Historically, the PDS in India has served as an important means of ensuring physical access to foodgrain at the household level through offering reasonable prices in all parts of the country. The PDS currently makes foodgrains accessible to eighteen crore[2] households through its mounting stocks (Mahendra Dev, 2005). The scope of the PDS has been growing consistently since the 1960s. Yet, despite this expansion, it has been subject to various systematic problems, and to increasing criticism (Chakraborty, 2005). According to Chakraborty (2005), spending on the PDS has increased substantially over the past several years, and yet this increase has neither been synonymous with rising food security nor with better targeting of the poor. In spite of government spending on food subsidization reaching 210 billion rupees, many of the poor are still not benefiting from the PDS. As a result, in the presence of excessive grain availability, hundreds of millions of Indians remain chronically undernourished and lack food security (Mahendra Dev, 2005).

Since food subsidy is generally viewed as a consumer subsidy, it can, in theory, be reduced by increasing the price paid by the consumer (that is, the issue price), or by reducing the number of PDS consumers eligible for the subsidy (by way of targeting). I argue that excessive foodgrain stock accumulation cannot be remedied by merely a shift in selling prices. The more deeply rooted issue of procurement and purchase prices must first be addressed. The government has failed to do so, and is thus plagued with a food policy that is unable to be implemented properly and to adequately support populations through the PDS. Regardless of this, both of these tactics have been employed by the Indian central government; issue prices have been raised and consumer restrictions have been introduced, further increasing foodgrain stocks held by the FCI (Kacker and Somanathan, 2002).

Grain stocks and prices have changed over time both as a function of government policy and due to seasonal crop success. In 1994-95, issue prices were raised and off-take from the PDS decreased, coinciding with good crops. As a consequence, foodgrain stocks increased over twofold from 6.6 million tonnes in January 1994 to 14.8 million tonnes in January 1995. Issue prices were frozen as a response and off-take increased. However, since this consumer freeze did not work in accordance with the increase of MSPs, the per unit consumer subsidy increased substantially (Kacker and Somanathan, 2002).

Although the PDS was originally a universal system, in 1997 it was reformed to a targeted public distribution system (TPDS). This system was introduced by issuing special cards which categorized families as the following categories: *below poverty line* (BPL) and *above poverty line* (APL) based on family income. Under the TPDS, approximately 60 million poor Indian families were permitted 10 kg of foodgrain per month

2 One crore is equal to 10 million.

(Chakraborty, 2005). Between 1998 and 1999, the subsidy on wheat increased from 1.43 rupees per kg to 5.36 rupees per kg. In the case of rice, the increase was from 94 paise[3] per kg to 5.89 rupees per kg. The rising per unit subsidy boosted off-take and surplus stocks declined to 2.9 million tonnes in January 1998, marking the lowest level in recent years (Kacker and Somanathan, 2002). In response to low foodgrain stock levels, the government increased the issue price for APL families between 1998 and 1999. This restrained the increase in subsidy per unit, but produced a rapid rise in surplus stocks to 7.6 million tonnes and 14.7 million tonnes in 1999 and 2000 respectively (Kacker and Somanathan, 2002).

As of April 2000, the issue price for BPL families was 50 percent of the economic cost, while food grain access was increased from 10 kg to 20 kg of grain per family per month (Hanumantha Rao, 2005). At the same time, foodgrain off-take declined by five million tonnes (Hanumantha Rao, 2005).

Jean Ziegler, United Nations Special Rapporteur on the Right to Food, has criticized the Indian government for altering the PDS from a universal system to a targeted one (Infochange, n.d.). Ziegler holds these changes responsible for the huge excess stocks of foodgrain held by the FCI. These unnecessarily high levels of procurement add to the cost required to run the PDS, leading to a substantially higher food subsidy bill than necessary, while millions continue to be restricted in access (Infochange, n.d.). Despite being clearly ineffective, the government has continued to attempt to cure the ills of the current PDS by furthering poorly oriented policies that in reality adversely affect those highly dependent on it.

Inefficiencies of the FCI have also increased the economic cost of foodgrains, leading to a corresponding increase in issue prices and thus a failure of the PDS. To reduce fiscal deficit, the government has sought to curtail the food subsidy bill by raising the issue price of foodgrains and linking it to the economic cost at which the FCI supplies foodgrains to the PDS. The economic cost comprises the cost of procurement (MSP), storage, transportation and administration. Costs remain high mainly because of the artificially inflated MSP as well as the operational inefficiencies of the FCI. This has pushed the issue price higher than the market rates and often beyond the purchasing power of families in the APL and BPL categories respectively, thereby resulting in the plummeting of off-take from the PDS (Goyal, 2002). APL families have thus had to essentially retain their foodgrains through market purchases, leading to the rise in market demand as a result. However, as previously discussed, the massive FCI procurement has crowded out market supplies, resulting in the relative rise in rates (Goyal, 2002). This has engendered an absurd situation of overflowing foodgrain warehouses amidst many hungry citizens because they cannot afford even the supposedly fair PDS price that has been artificially inflated due to an unjustifiably high MSP.

In conclusion, increasing foodgrain stocks have been the result of the Indian central government's inappropriate setting of MSP levels, which have in turn reduced food security within the country. Higher procurement prices have edged out private trade while causing the FCI to accumulate more foodgrain than required for food security. Increased issue prices and targeting have been utilized as a means to cope with the costs associated with raising foodgrain stocks, and food security has been threatened in the process. As issue prices rise and off-take drops in conjunction with the increased MSP, farmers benefit but undistributed stocks increase, while beneficiaries of the PDS are limited in their access to grains. In this sense, Indian farmers are benefiting unequally compared to those who require fair access to subsidized foodgrains. The government's actions have not only harmed the poor, but have inevitably rendered the PDS incapable of properly serving vulnerable citizens. In light of this, it is therefore apparent that the MSP procurement process must be reformed with its supposed beneficiaries in mind, to better address food security in India and to ensure retention of appropriate levels of foodgrains.

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Bringing the Political into the Ecological: Understanding Development and Environmental Degradation

Gemma Boag

ABSTRACT – *For so many years, academics have been discussing problems of society and the environment in isolation from each other. Yet the issue of development brings the separation of these two areas of study to the fore, prompting questions about the merit, or moreover even the possibility of academically separating these two fields on the question of environmental degradation. Much of the world lives in increasingly marginalized environments - but is this situation due solely to ecological factors, or are there other forces at work? This essay seeks to engage with the theory of political ecology and reveal the unequal power relations inherent within what are otherwise viewed as apolitical environmental problems. A better understanding of this body of thought is essential to approaching issues of environmental degradation in the context of the Global South.*

RÉSUMÉ – *Pendant tant d'années, les scolaires avaient discuté des problèmes de société et environnement séparés l'un à l'autre. Mais le problème de développement met en évidence ces deux problèmes qui incitent des questions à propos du mérite, ou de plus même la possibilité de séparer académiquement ces deux domaines au sujet de la déchéance environnementale. La plupart du monde habite dans des environnements qui deviennent de plus en plus exclus – mais est-ce que cette situation est dû à seulement des facteurs écologiques, ou y a-t-il une présence d'autres influences? Cette rédaction essaie de s'engager avec la théorie d'écologie politique et révéler les relations inégaux de pouvoir inhérent dans ce qui sont autrement vues comme des problèmes environnementaux apolitiques. Une meilleure compréhension de ce corpus de pensée est essentielle pour se rapprocher des problèmes de déchéance environnementale dans le contexte du Sud global.*

INTRODUCTION

The Maasai are an indigenous ethnic group residing in southern Kenya and northern Tanzania who traditionally pursue a semi-nomadic pastoralist lifestyle. Nomadism is an essential part of the pastoralist political economy, moving herds across the savannah to take advantage of the best grazing sites and water sources. This technique has ensured that rangelands have time to recover between grazing periods and can continue to support the dynamic ecosystems in East Africa. However, pastoralism in the Kenyan savannah has become increasingly unsustainable and, many argue, contributed to desertification of the region in the post-colonial period. Ecological degradation due to overgrazing and drought has in turn led to social degradation as the Maasai find it increasingly difficult to survive purely through herding. Conservation biologists contend that this is due to human population growth exceeding the land's carrying capacity, environmental constraints and unrestricted grazing (see Hardin, 1968; Mainguet, 1991; Le Houerou, 2002). Such an apolitical analysis neglects the significant impact that conservation policies have had on groups like the Maasai since the beginning of the 20th century (Neumann, 1996). The internal workings of pastoralism do not necessarily lead to desertification in themselves, having existed sustainably for over five hundred years (Galaty, 1991; Bollig & Schulte, 1999).

Rather, political efforts to enclose the Kenyan landscape during the colonial and post-colonial periods have forced the Maasai onto increasingly smaller and less productive amounts of savannah land, reducing their movement and ultimately resulting in overgrazing (Johnson et al., 2006).

With this example in mind, this paper argues that it is essential to consider political, historical, social and cultural factors in such cases of apparently apolitical environmental degradation. Political ecology, as a theory of development, acknowledges this dynamic interdependence. As a discipline, it emerged as a reaction to development theories that failed to take the environment into account, as well as those that *did* consider the environment but failed to incorporate political factors into their analytical frameworks. More importantly, it emerged within the rise of a larger body of neo-Marxist work, intent on factoring power relations into the study of environmental problems.

This paper argues that the tenets of political ecology should be applied to cases of environmental degradation and/or conflict to determine the role of political factors in precipitating problems like overgrazing on the savannah. Pastoralism is not an inherently unsustainable practice – certain historical factors and power relations have also worked to produce this environmental problem. There are three components to this essay: (a) an examination of the main principles of political ecology and a review of the major contributions to the theory; (b) application of political ecology to the case of Maasai pastoralists; and (c) identification of some potential weaknesses of the theory.

OVERVIEW OF POLITICAL ECOLOGY

The theory of political ecology performs two fundamental tasks: firstly, much like gender theories of development, it brings the environment into the development debate where this was previously ignored; secondly, it rejects environmental theories that ignore the social and power relations often prevalent in development issues pertaining to the environment. This framework is useful in examining environmental problems ranging from water resource issues to conservation problems - for example, pastoralism in Kenya - to changes in agricultural practices (Jones & Carswell, 2004). As a body of thought, political ecology emerged in the 1960s to 1980s and has pervaded the disciplines of political science, development studies, geography, anthropology, history and sociology.

For the purposes of this essay, I will rely on a general definition of 'political ecology' set out by Blaikie & Brookfield (1987) in their seminal work *Land Degradation and Society*:

> The phrase 'political ecology' combines the concerns of ecology and a broadly defined political economy. Together this encompasses the constantly shifting dialectic between society and land-based resources, and also within classes and groups within society itself (p. 17).

Peet & Watts (1996) set out a more practical definition of the term, describing it as a field of study that "seeks to understand the complex relations between Nature and Society through careful analysis of social forms of access and control over resources – with all their implications for environmental health and sustainable livelihoods" (p. 4). In terms of its relation to the field of development studies, political ecology has mainly been employed in rural locations of the global South, prompting consideration of the local, national and global political context in which decisions about the environment are made (Jones & Carswell, 2004).

Political ecology finds its roots in the social and political activism of the 1960s, with the emergence of the environmental movement (Neumann, 2005). Rachel Carson's *Silent Spring*, published in 1962, provoked discussion around the many negative environmental impacts wrought by the industrial revolution and modernization of the past century and a half. This awareness was furthered a decade later with the United Nations Conference on the Human Environment and the creation of the United Nations Environment Programme (UNEP). In the same year, a report by the Club of Rome, *Limits to Growth*, was published, criticizing many economic theories for their adherence to the ethos of unlimited growth and disregard for environmental issues (Martinussen, 1997). Over the same period, figures like René Dumont, a French leader in the European Green movement, advanced the applicability of political ecology to issues in the global South and North-South power relations (Neumann, 2005). This would set the stage for the emergence of political ecology as a field of study in the 1980s.

The theory of political ecology is the most recent attempt at bringing together the natural and the social sciences on the topic of the environment. Emerging specifically as a reaction to studies in human ecology and ecological anthropology (Vayda & Walters, 1999), political ecology was an effort to firmly incorporate a political economic perspective into the study of environmental problems. The only other field that had begun

to incorporate social sciences into the study of the environment was cultural ecology. The general definition provided above by Blaikie & Brookfield (1987) was prompted by the need for an analytic framework that incorporates both physical and social processes into the study of the environment and development – which can then eventually be extrapolated to create generalized processes.

The rise of neo-Marxism in the social sciences also played a very important part in the development of political ecology. Academics used Marxist theories to uncover the power relations present in many ecological problems that were thought to be caused solely by population pressure and natural biological processes (Peet & Watts, 1996). However, while this was the immediate context in which political ecology emerged, the study has received major contributions stretching back to the 18th century.

THEORTICAL ORIGINS OF POLITICAL ECOLOGY

Adam Smith's version of classical political economy, laid out in the influential *Wealth of Nations* (1776), is seen as one of the historical theories supporting present-day neoliberalism.[1] However, Smith's work was largely based on his commitment to social justice, values not readily associated with neoliberal policies. His concept of the 'invisible hand' was meant to regulate the economy so that the maximum number of self-interests would be fulfilled and that the masses could be lifted out of poverty (Lumley & Armstrong, 2004). However, the invisible hand of the market has tended to ignore environmental 'externalities' in both classical and neoclassical schools of political economy. Neither of these schools' respective price theories - the labour theory of value and the marginal utility theory of value - take environmental costs of production or consumption into account. Market economics makes no distinction between renewable and non-renewable natural resources, leading to economic theories that do not factor in the cost of working with finite resources (Rist, 1997). In these economic frameworks the concepts of 'development' and 'improvement' do not include environmental considerations. Political ecology has brought the environment into this discussion of political economy and called for an insertion of ecological considerations in the study of market economics.

Following Smith in the 19th century, Karl Marx and Friedrich Engels brought the concept of the environment back into the debate over political economy. In Marx's opinion, capitalism had made nature solely a tool of humankind - that is, something either to be consumed or used as a means of production. Commodity fetishism, a process that replaced face-to-face human relationships with ones based on commodities, divorced the worker from nature, leaving them blind to the environmental effects of their labour (Marx, 1867). This theoretical observation by Marx in the 1800s is relevant in contemporary society where people living in the Global North, or industrialized countries, are completely divorced from the environmental consequences of the commodities they purchase every day. Because the bulk of consumer items in the Global North are now produced in Southern countries, environmental problems such as pollution and waste disposal are frequently ignored in the production costs of these items. Consequently, it is often the poor and marginalized who are left to deal with these issues.

Despite Marx's clear concern with the effect of capitalism on the environment, some thinkers dispute Marx's environmental concerns because of his strong focus on industrialization, which is an extremely environmentally destructive process. Recalling Marx's teleological view of history, his concept of development requires moving through capitalism to socialism and finally on to communism (Marx, 1846). This process does not directly take environmental factors into account. In fact, if passing through capitalism is a necessary step on the road to communism, one could argue that Marx's conception of development *de facto* acknowledges the destructive effect this phase of history will have on the world.

Another important foundation of political ecology was the work of Thomas Malthus. In the 19th century, Malthus (1824) theorized that while the human population size would increase geometrically, agricultural production levels would only increase arithmetically; he forecast a great crisis and population crash as the earth reached its 'carrying capacity.' The 'Green Revolution,' beginning in the 1940s, did manage to significantly increase food production alongside population growth in some regions of the world, avoiding Malthus' predicted crisis. The benefits, however, were often short-lived and in some cases the agricultural innovations produced serious environmental problems, draining water sources and polluting the land with petroleum-based inputs. The surge in new production also slowed, leaving many people in a state of food insecurity. Therefore it was not long before Paul Ehrlich reinvigorated Malthusian population theories with

1 In this paper we use David Harvey's definition of neoliberalism: "Neoliberalism is a theory of political economic practices proposing that human well-being can best be advanced by the maximization of entrepreneurial freedoms within an institutional framework characterized by private property rights, individual liberty, unencumbered markets, and free trade (2007, p.22).

The Population Bomb (1968), which was published around the time that political ecology was first emerging (Martinussen, 1997). In particular, he identified population growth as the single most important problem facing humanity. These population theories contributed directly to the development of political ecology, which rejects such deterministic views. Political ecologists fought the notion that population growth was the only reason that countries in the South were underdeveloped and called for the consideration of political factors amidst the environmental issues facing these regions. Nevertheless, neo-Malthusian theories remain popular in the 21st century, as evidenced by bestselling works like Jared Diamond's *Collapse* (2005).

Karl Polanyi, writing in the 20th century, considered the environment in his analysis of capital. His concept of fictitious commodities explains how many natural resources like land, labour and water have been commodified, but cannot be reproduced like other normal commodities. By treating non-renewable natural resources like consumer goods, Polanyi argues, we are preparing ourselves for environmental crisis. Polanyi identified society and nature as the same thing, arguing that it would be destructive to place them within a market system because they would no longer have any self-control over factors the market did not regulate, such as environmental degradation (Polanyi, 1944). Drawing economics into the consideration of environmental problems was a proximate contribution to the theory of political ecology that would rise soon after Polanyi's work.

THEORY OF POLITICAL ECOLOGY

The term 'political ecology' was first used in the 1970s by people such as journalist Alexander Cockburn and anthropologist Eric Wolf to explain how resources were distributed and the role this system played in environmental degradation (Peet & Watts, 1996). This idea was further developed in the 1980s, when theorist Piers Blaikie published *Political Economy of Soil Erosion* (1985), and *Land Degradation and Society* (1987) with Harold Brookfield two years later. Using the specific case of soil erosion in Southern countries, Blaikie argued that the environmental problem was a result of politically-directed changes to land use, and not simply the farming practices of the tenants.

The three assumptions that Blaikie and Brookfield see as central to the study of political ecology are: (1) that environmental degradation is the result of mutual causation: poverty leads to degradation but, at the same time, low income results from living on degraded, marginal land; (2) that studies of local environmental problems in developing countries must be examined within a broader framework of 'multi-layered analyses' that take the whole region into account; and (3) that all land management occurs within the context of larger political structures like the state, international institutions, and the world economy, which all shape power relations at a global and local level (Peet & Watts, 1996).

Following these assumptions, Blaikie & Brookfield (1987) identify several analytical tools used by political ecologists. Firstly, they discuss a "refined concept of marginality" whereby political, ecological and economic aspects are seen to be mutually reinforcing and thus cannot be examined in isolation of one another (p. 23). Socially marginalized people are forced into marginal parts of the environment, resulting in degradation of both human communities and ecological systems. Secondly, environmental problems are often the result of externally-imposed production pressures. Thirdly, it is recognized that there is a lack of historical environmental data. Therefore, any research must take a 'plural' approach in order to explain the causes leading up to a certain environmental problem, especially if its roots are seen to extend relatively far beyond the current period (Peet &Watts, 1996).

While Blaikie & Brookfield "put a name to a new field" (Neumann, 2005, p. 35), many other scholars helped consolidate political ecology as a theory. The publishing of Richard Peet and Michael Watts' *Liberation Ecologies* (1996) moved political ecology from simply a response to neo-Malthusianism and an improvement of cultural ecology to a theory looking seriously at the "causes of and solutions to environmental degradation and risk" (Neumann, 2005, p. 41).

Arturo Escobar (1999) has also made recent valuable contributions to the field, emphasizing that 'nature' is a construct, while highlighting the importance of taking an antiessentialist stance with regards to environmental issues.[2] His work calls for a better balance between the culturally-constructed elements of nature and the biophysical elements of ecology as an "independent order of nature" (Escobar, 1999, p. 3). Perspectives like

2 The 'antiessentialist' perspective taken by Escobar is in reference to the 'essentialist' views taken by both some environmentalists and some cultural theorists. The former often define nature as something separate and outside the realm of humans and society. The latter fall on the extreme other end of the spectrum, seeing nature as a complete social construct, devoid of anything 'natural' and ignoring its biophysical characteristics.

this may finally bring sociologists and biologists together in a more productive manner and address some of the criticisms aimed at political ecology over the last two decades.

CASE STUDY: CONSERVATION, DEGRADATION AND THE MAASAI

Many conservation biologists and rangeland ecologists have argued that pastoralism on the Kenyan savannah has contributed to ecological degradation and desertification. Desertification is defined by the United Nations Convention to Combat Desertification (UNCCD) as "land degradation in arid, semi-arid and dry sub-humid areas resulting from various factors, including climatic variations and human activities" (UNEP, 1994, p. 4). This degradation takes the form of soil compaction, erosion, reduced rainfall and decreased vegetation productivity of the land (Geist, 2005). Pastoralists, it is argued, overstock grazing areas beyond their carrying capacity, which removes vegetation before it can be replaced and eventually leads to desertification (Thomas & Middleton, 1994).

For centuries, the Maasai have depended on shared land access to graze and water their livestock, a cultural norm that forms the basis of the nomadic pastoralist political economy. The Maasai currently reside on both sides of the Kenya-Tanzania border, numbering approximately 800,000 to 900,000 in size.[3] Traditionally, groups containing multiple families move their *enkang* (household) every few years to take advantage of the best environmental conditions and build new homes. During the year, herds are moved to wet and dry season grazing sites (Homewood & Rodgers, 1991).[4] [5]

With the establishment of 'British East Africa' in 1895, European settlers began to enclose the savannah landscape, restricting the Maasai's access to land and making it increasingly difficult for them to move their herds of cattle, goats and sheep around in response to climatic variables. The colonial Treaty of 1911 set aside a part of southern Kenya as the 'Maasai Reserve,' a region that today encompasses the districts of Kajiado and Narok (Campbell, 1984). In 1913, a large group of Maasai from the Laipikia plateau (north of Nairobi in central Kenya) were moved south of Nairobi to this 'reserve', where the majority of Maasai in Kenya remain to this day (Lamprey & Reid, 2004).

The initial goal of this relocation was to provide more agricultural land for white farmers and create game reserves for sport hunting. By the 1930s and 1940s, however, colonial scientists became interested in trying to preserve the savannah ecosystem because of its biodiversity and tourism potential. The National Parks Ordinance (1945) established the rules that would govern protected areas and formally exclude people, including the Maasai, from living within park boundaries or accessing enclosed pasture and water sources (Campbell, 1984).

British colonial authorities constructed pastoralism as degrading to the savannah landscape and at odds with their goals of biodiversity conservation. Many scientists argued the Maasai would keep accumulating livestock, while removing vegetation at rates faster than reproduction levels. However, Sandford (1984) has pointed out that there was a lack of "real data on desertification, overstocking [and] actual livestock numbers" in colonial documents and reports to support this claim (quoted in Homewood & Rodgers, 1984, p. 433). The enclosure of the savannah and eviction of the Maasai from conserved areas was part of the colonial process of relocation and spatial organization that was intended to 'civilize' the Maasai. This group was often portrayed as 'aggressive' compared to 'peaceful' farmers of other ethnic groups because their nomadic movements frequently impinged on enclosed territories (Broche-Due, 2000).

Enclosure, on the one hand, allowed for conservation of savannah land, but it also promoted the British objective of sedentarizing the Maasai. Pastoralists were settled in towns with school, health and government facilities. These facilities, with policies guided by the central government, helped to transform the Maasai imaginary (particularly that of young students) to align with the view of the elite that settlement would enable "a marginal and insufficiently integrated group [to be] transformed into good citizens by modernization

3 These are very rough population estimates as they are based on incomplete and outdated census data. Sources include census information from Kenya in 1989 (last national census with accurate breakdown by ethnicity) and estimates of Maa-speaking individuals in Tanzania as of 1993. The Tanzanian government does not ask individuals to identify by ethnicity in their censuses, making accurate estimations of the current Maasai population difficult.

4 Homewood & Rodgers (1991) focus primarily on the Maasai living in northern Tanzania, but the authors' description of Maasai social organization extends to groups living in southern Kenya.

5 For more detailed information on the Maasai and their social organization see Galaty, J. & Salzman, P.C. (1981). *Change and Development in Nomadic and Pastoral Societies*. Leiden: E.J. Brill.

andeducation" (Kenny, 1997, p. 137).[6]

Thus, this attempt to 'enlighten' the Maasai through sedentarization and eviction from communal lands has concentrated grazing activities on increasingly smaller amounts of land, ultimately leading to the degradation of such areas, with "pastoralists at the margins of their former lands and the margins of their former existence" (Goodman, 2002, p. 282).[7] Using the theory of political ecology, one can see how the elements of history and power, when taken into consideration in this case, show that pastoralism is not, in and of itself, degrading to the savannah, but rather that this problem has been created through colonial policies of conservation, enclosure, and 'civilization' of indigenous populations.

CRITICISMS OF POLITICAL ECOLOGY

Like any theory, political ecology has its weaknesses. Many argue that political ecology is not a full theory in the sense that it lacks general explanatory power. Instead, it provides more of a conceptual framework that one can use to incorporate evidence from both the social and the natural sciences in terms of development and the environment (Martinussen, 1997). But political ecology has even been criticized on this general note. Vayda & Walters (1999) argue that the perspective emerged primarily as a reaction to the lack of social sciences in environmental theory, bringing in a much heavier amount of political analysis than physical ecological research and failing to strike the intended disciplinary balance. The authors reject the political ecologist's belief that politics *always* plays an important role in environmental change. Because political ecology emerged as a rejection of the study of ecology without politics, Vayda & Walters (1999) argue that this has turned the theory into one of "politics without ecology" (p. 168). Their alternative to political ecology is called "evenemental" or "event ecology" (p. 169). The methodology of this theory involves a form of causal process-tracing whereby the experimenter begins with a specific focus on the environmental case or change in question, and then works back from that event to uncover the causal chain of events that led up to it. They argue that this approach will take ecological factors into account more successfully and that the process-tracing approach will not privilege pre-determined factors but rather get at the real causal factors. Underlying this criticism is a more general view that political ecologists ignore the work of environmental science, discussing topics where they do not understand the biological processes involved. This is often the case in discussions about pastoralist degradation in East Africa. Biologists and political ecologists are still learning how to work with each other and realize a mutual benefit from their research.

Others criticize political ecology for not seeking to influence policy. When it does attempt to do so, it is often dismissed as ineffective. For example, political ecology has had virtually no engagement with some of the world's most important international research programmes dealing with environmental change and human-environmental relations, such as the Intergovernmental Panel on Climate Change, the International Geosphere-Biosphere Programme, the International Human Dimensions Programme on Global Environmental Change, and the Millennial Ecosystems Assessment (Walker, 2006). In the case of pastoralists, political ecology has done little to support land rights activism for the Maasai in Kenya and Tanzania. It is unclear how such research could influence East African governments to change their policies regarding conservation areas so as to increase the land available for pasture and water.

Taking this into account, it may be argued that while analytical perspectives that are solely critical can be useful, they can also be incredibly frustrating. People are left in a postmodern 'double-bind' when every option is criticized out of existence, paralyzing the actor and making the notion of positive change elusive. Walker (2006) suggests that alongside political ecologists' work involving critical analysis, there should exist the creation of "compelling counter-narratives" (p. 385). Strong and compelling narratives in the social sciences include the free market's 'invisible hand' and the 'tragedy of the commons.' Yet powerful concepts that counter these narratives are lacking in political ecology, which, Walker (2006) argues, is a detriment to its social utility and prevents the discipline from engaging with society outside of academia's ivory tower. Without such alternative narratives, marginalized communities will not realize the benefit of new policies that could benefit both their families and their environment.

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6 These colonial policies have been followed by another enclosure phenomenon in the post-colonial period with the creation of 'group ranches.' Land that had been accorded to the Maasai prior to independence was divided into parcels governed by groups of Maasai men in an attempt to give them some control over the territory. This, however, has led to increasing rates of ranch subdivision, arguably aggravating land pressures initiated in the colonial period. This phase of Kenyan history is beyond the scope of this paper, but for more information see Galaty (1992) and Kimani & Pickard (1998)

7 Goodman's (2002) research refers specifically to Maasai living in Tanzania, however his observations are also applicable to the case of Maasai in Kenya, just across the border.

Apart from its instrumentality as a theory, some have pointed out weaknesses with the theory of political ecology itself. Some argue that the political ecology of the 1970s and '80s focused so much on the power relations present in environmental degradation that they overemphasized the role of the poor in Southern countries as the primary offenders in environmental problems (Bryant, 1997). They failed to adequately acknowledge the equal – and, in many cases, greater – role of the wealthy in creating those problems. The analytical focus on poverty being the primary cause of environmental degradation was said to be too narrow because wealth accumulation is often more environmentally destructive. We must also remember that politics has an equally significant influence on ecological problems in the Northern world.

Another potential internal weakness is the argument that political ecology needs to understand class and power relations on a deeper level; in fact, it is when political ecology comes close to discussing surplus extraction that it is closest to being a real theory (Peet & Watts, 1996). Indeed, Marx's concept of primitive accumulation should be seen as central to political ecology: in order for capitalism to function, it needs to exploit surplus labour in order to make a profit that it can then reinvest in the production process. This surplus labour is in turn acting on the environment (this is perhaps most evident in the area of agriculture). By extracting the surplus labour, the capitalist is not only further impoverishing the labourer, but is further exploiting the resources with which the labourer is working. Thus, primitive accumulation is as much about the accumulation of surplus labour as it is about extracting surplus exploited wealth from the land.

CONCLUSION

By this point, I hope it seems counter-intuitive to think that environmental problems and human development can be analysed in complete isolation. Any ecosystem occupied by people has been shaped by that anthropocentric impact, whether good or bad. Moreover, as in the case of the Maasai, not all human activities are inherently ecologically degrading. Returning to Blaikie & Brookfield's (1987) "refined concept of marginality," the Maasai are a marginalized group that has been pushed into marginal parts of the East African savannah, resulting in degradation of both their communities and the surrounding ecology. Political ecology provides a theoretical framework that recognizes this dynamic interaction between political, social, historical and ecological factors, allowing environment and development issues to be examined in a holistic fashion. Defined as an approach that integrates the social sciences and natural sciences, political ecology specifically links ecological problems with political factors. In this sense, major political ecologists like Piers Blaikie explain how the causes of many environmental problems cannot be explained using solely biophysical techniques, but that it is necessary to draw on sociological and political research methods to reveal the power relations at the base of many issues. Arising in the 1960s to 1980s, political ecology shifted from a basic theory integrating the environment and the political world to a post-structuralist project that questions the most basic positivist assumptions on which conventional environmental science rests. Closely tied to the neo-Marxist movement, political ecology rejects capitalist development on the grounds that the power relations it has created are degrading the environment.

This body of thought is vast and constantly shifting with the work of new theorists. As shown in the case of the Maasai, however, it is readily applicable to a variety of environmental issues and provides the theoretical framework needed to understand them. In the future, the challenge for political ecology is to continue to expand the tools it can offer to address such problems, as well as take up some of the issues posed by its critics. One cannot separate the people from the land – just as the reproduction of each is intimately tied to the other, so is the rehabilitation.

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Making Progress? Evaluation Processes in the WUSC Plantation Communities Project in Sri Lanka[1]

Geoffrey Cameron & Rachel Yordy

ABSTRACT – *This paper is a case study of the evaluative processes used in a CIDA-funded basic rights project in Sri Lanka. Implemented by the World University Service of Canada in marginalized tea plantation communities, the initiative has evolved – in only four years – from a project proposal to a comprehensive multi-site development project. With research based on interviews and field visits, we examine the impact of popular reporting frameworks, such as Results-Based Management, on the pattern of relationships between various project stakeholders – between cities and villages, Canada and Sri Lanka. Within our analysis, we make a conceptual distinction between evaluation that improves project operations and evaluation for accountability. We draw conclusions about the merits and limitations of project assessment tools, practices, and policies, and highlight the tensions in the system of international development assistance that arise within evaluation processes.*

RÉSUMÉ – *Cet article est une étude de cas sur les procès évaluatifs utilisés dans un projet de droits fondamentaux financé par l'ACDI à Sri Lanka. Établie par l'Entraide universitaire mondiale du Canada dans une communauté de plantation de thé isolée, cette initiative a évolué en seulement quatre ans d'une proposition d'un projet à un projet compréhensif de développement multisite. Utilisant des recherches basées sur des entrevues et des visites in situ, nous examinons l'effet de cadres de reportage populaires, tels comme Gestion axée sur les résultats, sur les habitudes des relations entre divers parties prenantes de projet – entre villages et villes, au Canada et à Sri Lanka. Nous faisons une distinction conceptuelle entre l'évaluation qui améliore les opérations du projet et l'évaluation pour la responsabilité dans notre analyse. Nous tirons des conclusions sur les méthodes, pratiques et politiques des méthodes d'évaluation du projet et nous soulignons les tensions dans le système de l'assistance du développement international qui surviennent dans les procès d'évaluation.*

1. INTRODUCTION

Undergraduate development studies curricula are commonly designed to emphasize the theoretical and historical aspects of development, providing students with the intellectual equipment to engage with development practice outside the classroom – typically on year abroad programmes or after graduation. Yet, as the field of development studies matures and Canadian IDS programmes expand, increasing voice is given

1 We are grateful to Dr. Chris Beyers, Paul Davidson, Karima Kara, Barbara Levine, Lesley Ouimet, Bozena Serafin, Bill Duggan, Alex Balasanthiran, Sarah Barkley and the WUSC PCP staff in Sri Lanka for their guidance and support over the course of our research for this paper. We have also benefited from the opportunity to share elements of this paper with the Assessment of Development Projects seminar (IDS 422) at Trent University and at InSight: the National Students' Conference in Development Studies (2006), where we received very helpful critical feedback from our peers. Thanks also to Tamsyn Farr, Nathan Wilkinson, Jenn L. Harris and Paige Morrow for helping to get this article into shape. Finally, we gratefully acknowledge the generous financial assistance of the Canadian Millennium Scholarship Foundation, the Trent University Academic Innovation Fund, and the World University Service of Canada.

to "the desire to seek out theory's *active expression*" at the undergraduate level (Grey et al., 2005, p. 70). Students and professors alike communicate the need for material that encourages critical reflection on applied skills (Morrison, 2004, p. 193; CASID-NSI, 2004).

This case study represents an effort to respond to this interest; it is one attempt, of hopefully many more, to carve a window into the wall between the classroom and the "field." We will focus on evaluation processes at a CIDA project designed and implemented by the World University Service of Canada (WUSC) to increase skills training and access to basic rights in fourteen tea plantation communities in Sri Lanka. This paper will investigate how evaluation structures relationships, engages actors, produces knowledge, and improves the rationality of project implementation.

While the rise of results-based management (RBM) as a management philosophy has given evaluation the connotation of helping a project to achieve "results," we consider evaluation to be concerned with a broader set of objectives. First, evaluation works to maintain coherence between policies and activities; it is the intermediary between broad programme themes and project implementation. Second, evaluation reinforces institutional relationships by operating as a mechanism to provide accountability and maintain oversight. Third, evaluation feeds into decision-making processes about the practical, ethical, and strategic directions of the project and the activities of project staff. Finally, evaluation aligns the project (whether explicitly or implicitly) with a normative vision of "international development." As a critical assessment of evaluation methodologies, this paper will not simply focus on what evaluation is, but how it works: how evaluation structures relationships, engages actors, produces knowledge, and improves the rationality of project implementation.

This case study is itself an exercise in evaluation, and we faced many of the limitations commonly encountered by external evaluators: a confined period of research, foreignness to the project context (cultural and political), dependence on translators, and a logistical reliance on the subject of the evaluation (WUSC). Despite these constraints, we feel that our analysis and findings are noteworthy because they represent the attempt of two undergraduate students to come to terms with the complex mechanics of project management and evaluation, reflecting the "educative, critically reflective self-knowledge that makes possible the questioning of beliefs and unstated assumptions in terms of which a particular practice is sustained" (Schwandt, 1997, p. 11).

We begin by introducing the components and objectives of the plantation project, before investigating the evaluative processes at work. Development logic can appear inscrutable to students, so we break down relatively integrated evaluation processes into elements that will make this case study an anatomy of development practice. We will examine both formal and informal evaluation processes to arrive at conclusions about the practical implications of evaluation methodologies.

2. OVERVIEW OF THE PLANTATION COMMUNITIES PROJECT

The Plantation Communities Project (PCP) emerged from a CIDA initiative to improve the socio-economic conditions of Estate Tamil workers in Sri Lanka's tea sector with the stated purpose of mitigating the spread of ethnic conflict between Tamils and Sinhalese to the centre of the country.[2] The Canadian Development Policy Framework identified within the PCP project plans is: "To support institutions that can address the political, social and economic causes of conflict in Sri Lanka" (WUSC-PCP APR 2002, Appendix 2). Although the project is ostensibly to prevent conflict by improving the socio-economic conditions of historically marginalized Tamils, the components of the project reflect more recognizable development priorities: capacity building, basic rights, gender equity, industrial relations, occupational health and safety, vocational training, and micro-enterprise development. These essential components are implemented to varying degrees in each plantation, with the ultimate purpose of improving the quality of life for Estate Tamils.

In the mid-1990s, CIDA began funding several pilot projects in the sector, and in the late 1990s it hired an external agency to prepare a proposal for a comprehensive multi-site project – complete with indicators and a draft logical framework analysis model (LFA).[3] In 2000, the project proposal was assigned a multi-million dollar budget and posted on a public bidding system[4] to allow interested NGOs to compete for implementation

2 It is important to note that "The Estate Tamils, living in the Central highlands, have… a separate identity which distinguish them from the rather self-conscious, indigenous Sri Lanka Tamils, who live in the northern and eastern provinces. Although they share similar language and Hindu religion with the latter, Estate Tamils differ from Sri Lanka Tamils by caste, occupation, education, their relatively recent arrival to the island, place of residence and political affiliations. It is therefore misleading to treat these two distinguishable Tamil groups as one entity, regarding them as just Tamils" (Hollup, 1992, np).

3 A logical framework (logframe) usually takes the form of a 4x4 matrix, which is used to track the linear connection between project inputs (e.g. digging wells) and a stated goal (e.g. improving village health) by realizing a specific purpose (e.g. decreasing transmission of water-borne diseases) (Middleton, 2005, p.42).

4 MERX is a private, web-based service often used by the Canadian government to post international development contracts

rights. WUSC put forward the successful bid and CIDA granted it the contract, making WUSC the Chief Executing Agency (CEA).[5] Although the conceptualization of the project took place over almost 10 years, the implementation began by WUSC in 2001. Beginning on three pilot estates in 2001, by 2005 the main activities of the PCP reached eleven estates and 8,357 people (WUSC-PCP S-APR, 2005).

The PCP serves tea plantations stretching across three administrative districts in the rolling hills of central Sri Lanka, with its head office in Kandy, the capital of the Central province. To improve the socio-economic conditions for plantation residents, the project is designed around skills training programmes for individuals and capacity building for community-based institutions, which are meant to increasingly facilitate and coordinate the activities of trained individuals. In the early days of the project, PCP project officers encouraged the establishment of Action Groups to serve as a mutual support network for training participants and to spread the impact of the training to other community members (Graham, 2006). Action Groups were a diverse lot: there were workers trained in occupational health and safety awareness, volunteers trained in the administration of birth certificate and National Identity Card applications, women trained in gender and development (GAD) principles, and union leaders trained in conflict resolution. Since 2004, however, WUSC has focused on strengthening each plantation's Estate Workers' Housing Cooperative Society (EWHCS), the constitutionally mandated cooperative created to encourage workers' self-governance in collaboration with management.[6] PCP Action Groups are increasingly integrated into the EWHCS governance structures, rather than operating autonomously as either formal or informal community-based organizations (CBOs).[7] As the core of the project exit strategy, the EWHCSs are treated as institutions that will allow the gains of the project to be socially sustainable.

WUSC plays a dual role in the plantation sector: it serves as both an executing agency and as administrative/management "convener." Although the purpose of the PCP is to improve the socio-economic conditions for plantation residents, the approach to programming is to strengthen the plantation sector as a whole by working with all stakeholders to identify common needs and interests.[8] In contrast to the practice of other NGOs working in the sector, WUSC first meets with management (rather than workers) to consult about the initiation of activities on the plantation. Since the receptivity of management significantly affects the latitude given to WUSC on the plantations, managers are considered a key stakeholder that can make or break the success of the project. The PCP Director articulates the convictions that inform the WUSC approach:

> [The project] should never jeopardize or threaten the industry; rather, it should strengthen the industry: help improve productivity, improve worker satisfaction, quality of work, those kind of things… and, as we all emphasize, it should improve the well-being of workers. (Duggan, 2006a).

WUSC also participates in sector-wide meetings with NGOs, government and business to compare experiences and trends. It has been an initiator of regular meetings among NGOs (both local and international) and the Plantation Human Development Trust (PHDT),[9] in which project success and challenges are discussed and collaborative working groups are formed. In the plantation sector, WUSC has been the sole international NGO to participate in the preliminary discussions with government officials on the National Action Plan for the reaching the Millennium Development Goals in Sri Lanka. Because of the dual role played by WUSC – as executing agency and as administrative/management convener – the dynamism of the PCP is not easily captured by the neat categorizations of regular reports. In a way, the PCP is defined as much by how it creates results as by the results themselves.

for open bidding. MERX describes itself as follows: "MERX is the most complete source of public tenders, private tenders and private-sector construction available in Canada. MERX has leveled the playing field so that businesses of any size can have easy and affordable access to billions of dollars in contracting opportunities with the federal government, participating provincial, municipal governments and the private sector" (MERX, 2006).

5 Unfortunately, specific terms are not made publicly available after the project contract has been won.

6 Estate Worker Housing Cooperative Societies are chaired by the plantation manager, but they have an elected body of workers who serve on the executive of each. As the organizational and financial capacity of workers increases, plantation management plays a diminished role in their operations. While the explicit purpose of the EWHCSs is to promote worker housing, the co-ops oversee community-based social welfare activities and some operate micro-credit and savings agencies, as well as community stores.

7 Other NGOs in the plantations sector have pursued the strategy of fostering the creation of autonomous community-based organizations, rather than supporting the development of the EWHCSs.

8 Bill Duggan (PCP Director) noted in an interview: "This is an industry, and in an industry the bottom line is profit… if the business doesn't flourish, no one's going to have a job" (2006a). Given that the tea industry accounts for 5% of Sri Lanka's labour force and roughly 15% of its exports, this also impacts the local economy and thus, the government as well (APR, 2003).

9 The PHDT is a semi-governmental body that was founded in 1992 to promote social programming on estates at the time of the re-privatization of the sector. Initially known as the Plantation Housing Welfare Development Trust, it was renamed in 2005 to reflect a mandate that now extends beyond infrastructure provision. The PHDT is present on all estates and works closely with the EWHCS, though possessing limited staff and resources for its broad mandate.

3. INTRODUCING EVALUATION PROCESSES

PCP evaluation processes reflect the current results-based management (RBM) approach to monitoring and managing international development projects. RBM is used to rationalize project implementation and provide accountability toward funding agencies. Rather than a single tool, it is a management philosophy and strategy that orients a project's contribution, narrowly defined, to broader social change. The changes identified as project goals are broken down into constitutive elements, each with verifiable indicators.

Because RBM demands that project targets be made explicit, project officers must conduct extensive baseline studies, engage in substantive negotiation with stakeholders, and collect exhaustive documentary evidence on the impacts and outcomes of activities. RBM is report-oriented: project officers and directors distil volumes of gathered information into authoritative statements on project results (Debidin, 2006). According to Sawadogo and Dunlop (1997), the adoption of RBM as a public sector norm has been primarily driven by public skepticism about the effectiveness of development assistance, which has increased demand for instant information and stringent government accountability measures. RBM deals with the problem of distance by representing far-flung projects in a manner that makes them relevant to the information needs of funding agencies, albeit without the clarity of firsthand context and complexity.

The WUSC field staff and head office, as well as CIDA officers, have employed RBM to serve their management objectives from the beginning of the PCP. Evaluation processes are used to define project indicators in line with WUSC and CIDA policies, keep the project "on track" regarding its goals, facilitate engagement between stakeholders, and make project information immediately available to senior managers at WUSC and CIDA.

1. Logical Framework Analysis (LFA)

Doug Graham, the first Field Director of the PCP, described the LFA as "the roadmap that is used to establish the framework for the project as well as the basis against which progress and results [are] measured" (WUSC-PCP PAC Meeting, 2002, p. 2). The LFA represents a detailed agreement between WUSC and CIDA about how the project will serve the overall development goal, which is "a statement of desired changes in society as a whole… to evolve into a desired end state at the end of the project" (Cummings, 1997, p. 594). All project indicators are derived from this goal statement on long-term social change, expressed through a matrix of interconnecting objectives, inputs, resources and outcomes (see Table 1). As one PCP project officer noted, "I consider the LFA to be a necessary evil, because the informal models [of monitoring and evaluation] have to fit into a logical form" (Perera, 2006). While the PCP is, to a certain extent, organic, the LFA fits project activities into regular internal evaluations of their relevance and alignment with the overall purpose and goal of the project.

The PCP LFA is a 3×4 matrix, designed to reflect the RBM philosophy. The vertical logic of the LFA spells out the specific agenda of social change that that project will address: the project *purpose* (*how* the project will further its goal), and the project *inputs* and *resources* (*what* the project will do to meet its objective). The first column of the LFA is the "narrative summary." The horizontal logic connects the project *goals*, *purpose* and *inputs* with "expected results" (a notable social change) and "performance indicators" (means of verification). Finally, the fourth vertical column lists *risks* that may disrupt the logical flow between the stated vision of social change and the expected results. The first line of the matrix presents the governing vision of the project and illustrates the horizontal logic of the PCP LFA.

Table 1: Abridged PCP LFA (Nov. 2001 Edition)

Narrative Summary	Expected Results	Performance Indicators	Critical Conditions (Risks)
GOAL To strengthen plantation communities and support programmes promoting economic activity, employment creation and provision of basic social services among those whose unfulfilled aspirations may fuel conflict	**IMPACTS** **1)** Acceptable socio-economic condition of plantation community residents **2)** Reduced ethnic tension amongst plantation and surrounding village communities	**1.1** Increased level of access and control in housing, services in education, health and jobs **2.1** Increased levels of socio-economic integration amongst Plantation and surrounding Village communities	• Pace of change sufficient to stem unrest and ensure stability of sector (High) • Community buy-in interest and acceptance exists (Medium) • Political environment remains stable enough to implement the PCP (Medium/Low)
PURPOSE To enhance the socio-economic conditions of both women and men working in and around the plantation sector	**OUTCOMES** **e.g.** PRCs reduce dependency on others and are able to equitably address identified needs and rights through the planning and implementation of sustainable community-based programmes	**e.g**. Number of community development initiatives and events organized with less reliance on Management. .	**e.g.** Sufficient commitment to gender equality exists to ensure effective social change (Medium/Low*)*
INPUTS/RESOURCES Project Budget Project Management Contingency Performance Review	**OUTPUTS** **e.g.** Strengthened individual plantation resident capacity for self-improvement and to support community initiatives through mobilization and awareness	**e.g.** Degree of participation of the community in alcohol- and health-related awareness initiatives	**e.g.** Gap between the high employment aspirations of youth and the reality is narrow (Medium)

The PCP is designed to bring about qualitative changes in the lives of workers and residents, but not through the quantitative increase of *resources,* as is the case with many other projects in the sector (Graham, 2006). According to one senior project officer, "it is a project to empower people to do things; we are not the Salvation Army…. We work as a link to help people in the community connect to the right people and resources" (Perera, 2006). This conception of the project goal and strategy is shared among most WUSC project officers, and it is consistent with criteria of project success outlined by the LFA. However, in order to produce formal, scientific, and authoritative knowledge about the project, most informal, experiential statements about *qualitative* changes in community functioning – the project *impacts* – must be measured against a *quantitative* set of performance indicators. Each project outcome – e.g. "improved industrial relations and sustainable livelihoods for women and men related to the local economies of the plantation area" – is paired with performance indicators – "the percentage of people (female and male) trained through the PCP with gainful employment" (WUSC-PCP APR 2002, Appendix 2).

By specifying expected results and performance indicators, the LFA allows "changes in the environment [to be] discovered quickly and inappropriate activities [to be] adjusted rapidly" (Rondinelli, 1994, p. 479). WUSC began offering vocational training to male and female tradeworkers, but found that only one third of women went on to receive gainful employment, compared with nearly two thirds of men. Consequently, WUSC offered training in more traditional trades for women – sewing classes rather than plumbing – and found that women's employment rate rose dramatically as a result (Balasanthiran, 2006; Nalee, 2006). The benchmark of project success, in this case, was not the execution of a planned set of activities, but the employment of women; therefore, the LFA served as a reference point to evaluate the success of training activities and to make immediate changes based on the unsatisfactory achievement of the performance indicator. The Deputy Director of the PCP reflected on this process of internal evaluation: "If people don't focus on the results, they will be confined to do only activities, without any meaning" (Balasanthiran, 2006). The "meaning" of activities, in Balasanthiran's sense, is assessed according to their logical connection with anticipated results.

The RBM-oriented LFA serves as a "dynamic management tool" that permits WUSC to appropriate the monitoring and evaluation functions traditionally performed by funding agencies (Sawadogo and Dunlop,

1997; Rondinelli, 1994). Although CIDA continues to monitor and evaluate the project by hiring independent consultants, WUSC officers agree that when the consultants visit the project,[10] their comments are generally "unsurprising" (Ouimet, 2006; Duggan, 2006b; Levine, 2006). The close compatibility between internal and external monitoring can be credited to the LFA, which generates standard benchmarks for project achievement. The LFA represents a process of *normalization*: "the production of norms, standards for measurement and comparison, and rules of judgment" (Ewald, 1990, p.148). It defines the parameters of what successful activities and worthwhile activities look like, which works as a framework within which WUSC and CIDA communicate about the PCP and its impact on plantation resident communities.

2. Performance Measurement and Reporting Framework

The Performance Measurement and Reporting Framework (PM&RF) is a table used by project officers to document qualitative and quantitative changes in project indicators on a twice-yearly basis.[11] Each project outcome is broken down into constitutive indicators (see Table 3). The PM&RF illustrates what activities have been conducted to improve the indicator, and collates substantial amounts of data to document progress: in a Semi-Annual Report, the fully completed PM&RF can be 35 pages (WUSC-PCP S-APR, 2005). While this is a time-intensive process, when completed over a given reporting period it provides a comprehensive snapshot of what has been achieved during that time. Detailing activities and assessing progress towards the achievement of project objectives occupies 40–80% of the time of Sri Lankan project officers involved with the PCP, and it is usually heavily edited by project managers to ensure that the standard of English is sufficiently high to communicate with CIDA officials.

Table 2: PCP PM&RF Headings (September 2005)

Indicators	Data Source, Collection Methods, and Frequency	Responsible Party	Baseline/ Target	Progress Made Toward the Achievement of Developmental Results During the Reporting Period	Cumulative Results of Project to End of Current Reporting Period (results measured against indicator)

Monitoring and reporting is ongoing during the project; project officers regularly report on their activities, achievements, and challenges, but the PM&RF translates this practical knowledge into a strategic representation of the project that addresses the problem of distance in international development. It standardizes monitoring so that complex information about social realities can be distilled and easily transmitted through the layers of communication from the field in Sri Lanka to upper-level management at WUSC and CIDA in Canada. Doug Graham (2006) remembers asking a CIDA officer if WUSC really needed to provide all of the project documentation that was being included in its progress reports:

> …and he said "Yes." I asked, "Is it because people really need all of that?" and he said, "No, it's because if somebody wanted to pick up one report, it has to be a stand alone, so that they can see everything about the project."

The PM&RF, therefore, serves a dual function: first, to represent the project to the donor agency and stakeholders, and second, to evaluate the success and effectiveness of the project. The use of the PM&RF to standardize reporting on the project is intended to allow managers to detect "inconsistencies in project performance" (WUSC-PCP PIP, 2001, p.46) but it is also a mechanism of oversight and accountability.

While these two functions are not contradictory, they exist in tension with one another. The PM&RF is designed to emphasize the *positive* aspects of programming, and, in some respects, it falls short of a faithful representation of the project. It requires the Micro-Enterprise Development (MED) Project Officer, for example, to state the percentage improvement on a given indicator, leaving little room to explain constraining factors or key elements of success (Thanakumar, 2006). While plantations often have over 20 WUSC-trained

10 Dr. Ron Hughes has served as the project's external evaluator, and conducted a one-time formal interim evaluation of the project in 2005. Harley Johnson is CIDA's independent governance monitor and technical advisor to the Sri Lanka Programme, and he visits the project annually to monitor its activities and achievements.

11 It is described in the PIP as "a guide towards achieving desired project results…which is structured around the PCP LFA" (WUSC-PCP PIP, 2001, p.45).

microentrepreneurs, only "the most promising and successful entrepreneurs" are officially reported on (Thanakumar, 2006).[12] The need to represent the achievement of "results" in official reporting leads, in this case, to neglect of the specific challenges faced by the other 18 or 19 microentrepreneurs that have not been experiencing notable success. Although project constraints and challenges are regularly discussed informally, and openly disclosed through internal staff reporting, they are not formally documented with the same rigour as are the corresponding project results.[13]

This explains Bill Duggan's (2006b) distinction between monitoring for *accountability* purposes (through formal processes such the PM&RF) and monitoring for *operational* purposes (through staff meetings, monthly staff reports, and field visits). These two forms of monitoring produce very different types of knowledge. The PM&RF is a challenge for many project officers to complete,[14] but it yields a project snapshot that, in the words of one senior project officer, is "sensitive and diplomatic":

> We do talk about challenges and failures but these do not go into the PM&RF. In general, the reporting going outside is a rosy picture; when it comes to lessons learned, it is not only the successes, but the pitfalls that must be documented (Perera, 2006).

The challenges and constraints that the PM&RF does document are often delicately phrased. Accountability does not require complete disclosure of the project's social realities; rather, it demands regular assessment of the project according to the benchmark standards specified in the LFA. The LFA defines what information is relevant, and non-quantitative targets, such as empowerment, are not easily captured within the PM&RF (Sivagurunathan, 2006). A former intern with the PCP confirms this:

> …[C]hanges in gender are difficult to measure because they are often something that is seen on a more subtle, private level. Also, changes in gender relations are long-term changes that are difficult to measure with simple quantitative data (Walji, 2006).

Walji compensated for the limitations of reporting by using case studies and anecdote. This has been a common practice among programme officers at WUSC, and she adopted it as a useful way to represent changes in areas that are not easily compared with benchmarks and targets. In response to this issue, WUSC has recently begun including case studies of more thoroughly documented project successes in its Semi-Annual and Annual Progress Reports.

3. Feedback Loops: Internal Monitoring and Reporting

The PCP, like most development projects, is sustained and directed by monitoring and reporting processes that are informally documented, if at all. Patterns of communication among field-based staff, project officers and project managers about the monthly or daily operations of the project often focus on tactical operational decisions or responding to unanticipated challenges in the field. This process of dialogue and engagement among different levels of the project team is commonly summed up with the term "management." This word is inadequate, however, to describe decision-making within a field-driven development project like the PCP, where decisions are often made by project officers rather than upper management. "The approach I take with staff," Bill Duggan (2006b) remarks, "is that they know the objectives and the results we're after, and as long as it's reasonable I let them figure out how." We prefer the term "feedback loop" to represent the informal evaluative processes that are essential to the successful execution of the project, as opposed to the formal processes of data compilation for inter-institutional communication.

PCP targets such as "empowerment" and "capacity building" require a level of community engagement that is impossible for project officers to sustain at every project site. For several project components, local

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12 The MED Project Officer readily concedes that project documentation through the PM&RF is selective, as is immediately apparent from the PM&RF itself (WUSC-PCP S-APR, 2005, Appendix 4, p.11).

13 At a collaborative meeting with other NGOs working in the sector, Bill Duggan conceded that WUSC and other NGOs "don't do as good a job at documenting mistakes" as successes. (Plantation Community Development Partners [PCDP] Meeting, 2006).

14 A senior project officer, with an excellent command of English, emphasized that it is not language difficulties but challenges with the content and structure of the PM&RF that makes its completion difficult. In written questionnaires about their use of RBM at the Kandy Office, project officers commented that a central challenge was knowing where to place specific results (WUSC-PCP Project Officers, 2006).

estate residents are hired as community-based "mobilizers" or consultants, and serve as extension teams for WUSC officers. GAD mobilizers work on virtually every estate, providing informal debriefings twice a month or more, when officers visit their estate, as well as submitting monthly written reports to the GAD project officer about estate activities and conditions (Victor, 2006). Yoga Perera (2006) remarks that GAD mobilizers "have a good sense" of the community "below the skin." Microentrepreneurship consultants meet with the project officer at monthly review meetings to confirm that their activities are in step with the officer's previous recommendations (Thanakumar, 2006). Because these staff are residents of the area, they provide a barometer as to whether initiatives are "faring well" or if there is discontent with WUSC activities.[15]

The formality of internal reporting increases with movement up the staff hierarchy. Field-based animators, as their title suggests, spend at least 18 days a month on the estates, but unlike mobilizers and consultants are still considered office-based staff. They do not have the same responsibilities for making strategic decisions about project activities as project officers; field-based animators support and facilitate initiatives implemented by project officers. Still, both project officers and field-based animators report directly on their activities to the rest of the staff through monthly office meetings: issues are raised, plans are shared, resources are offered, feedback is given, and contentious issues are presented. These meetings serve to share information and involve the staff in decision-making about strategic directions for the project – for instance, how WUSC will work with a local partner on the issue of alcohol abuse. Bill Duggan (2006b) remarks that staff meetings discuss "best strategies or the best use of time or money, and that sort of thing… if there's a particular challenge on an estate, like an historical problem or personalities… we're trying to figure out how to fit the pieces together."

In addition to taking part in twice-monthly meetings, office-based staff are required to provide written monthly reports on their own activities and the activities of the community-based staff they supervise. Monthly reports are formatted in alignment with the LFA, and most staff find them a helpful way to register the work they have conducted and the challenges they are facing in the field. These written reports are often used to recall specific data for inclusion in the twice-yearly PM&RF, but they are typically more detailed and reflect a greater degree of critical self-awareness. For example, S. Ramar, a project officer for capacity building, will report regularly on different strategies used to expand EWHCS membership. Rather than prescribe activities to community-based staff, he encourages them to attempt various activities to improve membership in the societies; when he meets with them they evaluate the relative effectiveness of different patterns of activity. His monthly reports, then, are the product of his learning and assessment of how to meet the project objective identified within the LFA. The secret to success, he notes, is making strategic decisions slowly: "it's learning and doing things" (Ramar, 2006). Interestingly, this informal system of monthly reporting more faithfully reflects the ethic and pattern of results-based management than does the selective technical reporting of the PM&RF.

4. Decision-making Forums

Decision-making forums are primarily deliberative – they involve project stakeholders in the task of steering the PCP. The most important of these is the Project Advisory Committee (PAC) meeting, an annual gathering of project stakeholders held to discuss PCP activities and outcomes. The first PAC meeting sets the agenda for the forum:

> The PAC will review key PCP documentation and will discuss and offer advice on the issues, approach and methodologies that are set out in the PCP documentation. It is also hoped that the PAC will ferment partnerships and promote linkages between key stakeholders and the PCP (WUSC-PCP PAC Meeting, 2002, p. 2).

PAC meetings are attended by representatives from powerful stakeholder groups (WUSC, CIDA, estate managers, the Government of Sri Lanka, and CBOs), who have steadily increased in number over the evolution of the project. In fact, at the most recent meeting PRC members made short presentations to demonstrate some project highlights to tea plantation managers (Graham, 2006). Last year, WUSC encouraged a dialogue between a picker who started her own business and a plantation owner from the company (Ouimet, 2006). The focus of the meeting, however, is to discuss and approve the Annual Work Plan (AWP) for the project.

15 There has been an effort by the Deputy Director to implement a system of monitoring the activities of community-based staff more rigorously (through the use of Gantt charts), but this has not met with unanimous consent. Several staff have defended the current model of hiring competent people and monitoring their performance according to informal systems of feedback and the achievement of desired results over the long term.

The AWP is approved by only CIDA and WUSC, but WUSC prepares the draft based on input solicited from most project stakeholders – including those not directly represented at the PAC meeting. Bill Duggan (2006a) notes that when conducting annual work planning, the stakeholder input process involves canvassing managers, workers, women, workers' cooperatives, and government officials through workshops and brainstorming exercises. Project officers from WUSC and CIDA – based in Ottawa and Hull – fly to Sri Lanka for the annual event and spend several days before and after the meeting to negotiate the terms of the AWP. At the PAC meeting, stakeholders raise interests and concerns about the project arising from previous years' experience (Ouimet, 2006); WUSC presents results-to-date with respect to the LFA; and plans and strategies are discussed to improve the alignment of the project with its intended results. After the PAC meeting, WUSC and CIDA "tend to have a separate… meeting to get involved in the nitty-gritty" and finalize the details of the AWP (Zimmer, 2006).

As a forum for negotiating the terms of the AWP, the PAC meeting serves as an important site for discussion of project objectives, indicators and strategies. This was particularly important during the first year of the project, when WUSC negotiated intensely and carefully with CIDA for significant changes to the LFA (Graham, 2006). People at CIDA argued for specific project targets that WUSC staff insisted would make a participatory and flexible project impossible in the long run. Levine (2006) recalls:

> We [WUSC] really tried hard to make the case for [a more flexible work plan] at the project steering committee meeting… I remember arguing with Doug [the Project Director] about language: "How do we present this in a way that is not perceived to be merely self-interest and still make the point that for this to succeed, community residents really need to understand the process and buy into it?"

At the first PAC meeting WUSC suggested new project indicators based on its inception mission – and CIDA staff responded by insisting that the indicators be "strengthened" with more detailed qualitative descriptions of gender equality and human rights targets (WUSC-PCP PAC Meeting, 2001).[16] WUSC countered this argument by insisting on the preservation of vague targets that would allow for flexibility in implementation; less-defined, qualitative targets would allow the project to be more adaptable to future circumstances. According to Lesley Ouimet (2006), debate over project indicators has continued at subsequent PAC meetings:

> When you start to deliver programming, you realize that the LFA is possibly not meeting exactly what your needs are, in terms of providing direction. Or you find that some of the indicators you've got are not as fine-tuned as you want or you're going off in a slightly different direction and you need to modify what you've said you will deliver.

Thus, in addition to approving the AWP, PAC meetings serve as a forum of negotiation around changing indicators "to acknowledge the changes taking place in the PCP" (Johnson qtd. in WUSC-PCP PAC Meeting, 2003).

4. DISCUSSION: EVALUATION FOR WHAT AND FOR WHOM?

Evaluation processes, as observed above, can be classified in terms of their purpose: for either *accountability* to donors and stakeholders or for improving project *operations*. These processes are of course interrelated, but disaggregating them allows us to draw tentative conclusions about the significance of evaluative processes and ask questions about their appropriate role in project management. The distinction between these two forms of evaluation roughly follows a similar philosophical distinction made by Schwandt (2000a) between evaluation as *techne* and as *phronesis*. The first refers to the productive activity of experts, who use or apply technical models to social reality in order to apprehend and produce an objective and impersonal image of a project. The second is bound up with the notion of *praxis,* "a form of human activity that has to do with the conduct of one's life and affairs as a member of society" (Schwandt, 2000a, p. 217). It relies on the judgment, interpretation, and understanding of those involved in evaluative processes and does not produce a *product*;

16 CIDA called for greater specificity on indicators for the cross-cutting themes of gender equality and human rights at the outcome level, incorporating more of a qualitative dimension; it requested that indicators at the output level be more closely integrated with results achieved; and it commented that particular qualitative outputs such as determining the attitudes and empowerment of community members were difficult to infer (WUSC-PCP PAC 2001).

rather, the purpose of *phronesis* is the achievement of excellence in carrying out the activity itself. Through the evaluative processes of the PCP, we can analyze the utility of each practice and the tensions between the two.

5. Evaluation for Accountability

The PCP is a project designed by CIDA, the staff of which identified project goals, outputs and outcomes prior to the involvement of WUSC as the implementing agency. When WUSC signed a contract with CIDA in 2001, it acquired the responsibility to implement a four-million dollar project to create qualitative changes in the lives of project beneficiaries over a four-year term. Because these are public funds – raised from Canadian taxes – the project is accountable to rigorous standards set by Canada's Auditor-General and enforced by CIDA. Formal evaluation processes are designed to hold WUSC responsible for achieving the outputs and outcomes that the project is *expected* to achieve. WUSC is required to prove that it is upholding its mandate to deliver project outputs and outcomes consistent with CIDA's original expectations.

Because the PCP, based in Sri Lanka, is accountable to CIDA and the Auditor-General in Canada, this type of evaluation is produced to meet the administrative requirements of people distant from and relatively ignorant of the project. Evaluation for accountability produces knowledge about the PCP that is standardized and measurable, with success and achievement expressed via indicators of social change that are largely abstracted from context. The project LFA, for example, specifies that the project output of "Strengthened Plantation Residents capacity to support community development initiatives" (WUSC-PCP APR 2002, Appendix 2) can be measured by three indicators: the number of plantation residents exposed to GAD sensitization programmes; increased awareness of the importance of alcoholism and its impact as an issue on PCP estates; and the percentage increase of the PCP Estate population with National Identity Cards. Qualitative changes in the personal and community lives of project beneficiaries are represented through quantitative evidence that maintains a necessary illusion of objectivity in its assessment of project success or failure. Through counting exercises and a limited degree of narrative, capacity building can be "proven" to CIDA desk officers and managers in Canada.

The twice-annual completion of the PM&RF is the primary accountability evaluation. Analysis of the project is built into the reporting framework, so officers are simply responsible for providing numbers that indicate relevant measurable changes on the established indicators. As discussed above, this yields a selective representation of the project that obscures successes and failures. Bill Duggan (2006b) reflects on the narrow scope of some reporting exercises:

> CIDA [staff], generally speaking… just don't really need to know [all the project details]. It doesn't mean it's not important, it just depends on who the audience is. Everybody has too much information and too much to read. So I guess it's just a matter of making sure that the *right* information gets across to the *right* people.

The information specific to CIDA's needs is that which is relevant to validating progress on project activities, assessing results and affirming or revising project policy decisions (Johnson, 2006). When Kathryn Zimmer (2006) receives PCP reports, she looks "to see that the activities have been carried out as planned, and what stage in the process we are at – at which results happen." This, of course, is an exercise in validation. At the level of the Asia Branch of CIDA, however, PCP reports are "rolled up" with those of as many as 300 other CIDA-funded projects to assess the agency's branch-wide effectiveness (Debidin 2006). The evaluation manager responsible for the CIDA Asia Branch assimilates project reports into his analysis of CIDA's annual achievements, which are in turn provided to the Agency Vice-President to inform decision-making about CIDA policy directions.

Formal evaluation processes for the purposes of maintaining accountability have both merits and clear limitations. Of course, accountability and public oversight is commonly considered a virtue of public administration, since it ensures that public funds are not spent indiscriminately. Because NGOs do not have conventional accountability requirements (e.g. to shareholders or publicly elected officials), formal evaluative processes ensure that social programmes implemented by NGOs operate with a measure of transparency. Furthermore, rigorous reporting through the CIDA bureaucracy also allows lessons from the field to be integrated into policy formulation; the representation of complex projects through measurable performance standards makes it possible to easily aggregate and compare the impact of policies through meta-analysis (Lipsey, 2000). Through the data accumulated from formal evaluative processes, CIDA can assess the likely

impact of future interventions into a particular sector, the efficacy of a particular policy priority, or the general impact of Canadian development projects in a given country context.

Stringent accountability standards and the promise of meta-analysis, however, can limit the effective implementation of the project itself. First, fulfilling technical reporting and monitoring requirements (e.g. the PM&RF) can consume well over fifty percent of the time of project officers, who may otherwise spend this time on productive project-related activities (WUSC-PCP Project Officers, 2006).[17] Because the reporting matrix corresponds directly to the LFA and project indicators, description of project activities, accomplishments and challenges is limited and selective. At a practical level, reporting that adheres strictly to performance standards – and neglects field-level analysis – causes project officers to feel a tension between self-criticism and positive representation of activities. Furthermore, technical reporting and evaluation frameworks build analysis of the project into their very structure by relieving project officers of the need to *actively* evaluate their activities. The reporting format is an attempt to scientifically manage the contextual and local knowledge of project officers by means of structured, controlled and more "objective" indicators of success and results.[18] Finally, while faithfully employing consistent standards of measurement – whether in the PM&RF or in the external evaluation – may make it easier for CIDA to produce general knowledge about their policies and development interventions, these exercises do not produce knowledge *specific* to the needs of the project itself. They do not describe social reality as it is; rather, they represent social phenomena in "general, non-intentional ways" to serve the evaluation needs of CIDA (Schwandt, 2000a, p. 214). No matter how technically perfect in terms of indicators or reporting rigour, monitoring and reporting frameworks do not render an "objective" perspective on a project.

6. Evaluation for Operations

Despite the most careful research and planning, a project like the PCP will always encounter unanticipated or uncontrollable circumstances. When this happens – especially in the context of an RBM approach – project staff require a degree of flexibility to navigate risks and failures by adapting activities and strategies about how to implement the project on an ongoing basis. Unlike in formal evaluation, where project activities are read into the LFA, in "everyday" evaluation the LFA is used less as a prescriptive guide and more as a set of constraints and parameters of what *cannot* be done. As Bill Duggan (2006b) remarks:

> It does help us limit, sometimes… You can be working hard and doing useful work, but you might be doing the *wrong* useful work. So the LFA helps to make sure that you're doing the *right* things… If you're not doing the *right* things or focusing on the right things, you're not going to achieve the objectives that you want.

This type of evaluative activity, then, is concerned with maintaining the rationality of project activities in a dynamic environment that is subject to social and political change. It reflects Schwandt's definition of evaluation as "a moral–political undertaking unfolding in the temporal world of everyday actions and corrigible opinions" (2000b, p. 227). Whereas formal evaluation processes inform long-term and policy-related decisions, these more informal processes are oriented towards short-term and immediate decisions about the implementation of the project.

Because operational evaluation is more practical than it is technical, it is characterized by its relative informality. Operational activities feature internal dialogue and analysis (such as the feedback loops and stakeholder meetings outlined above) rather than a reliance on outsiders or prescribed methods. Project officers consult, seek advice and share challenges among themselves, with project management and in collaborative forums with other actors in the plantation sectors. Some internal processes are more formal, such as twice-monthly staff meetings, monthly reports of project officers, and PCDP meetings. Project officers find out what is working and why through discussions with community-based staff and periodic visits to different plantation communities (Thanakumar, 2006; Perera, 2006). The social reality of the plantation communities is assumed

17 We have cited the percentage above as an average of what was reported to us in questionnaires completed and submitted anonymously by project officers. Bill Duggan, however, estimates that project officers spend less than 20% of their time on formal reporting. Although these estimates differ substantially, we have favoured the one provided by project officers themselves for obvious reasons.

18 For an extended (and fascinating) discussion of the relationship between social scientific approaches to evaluation and modern technicism, see the debate between Schwandt and Lipsey in the American Journal of Evaluation, 21(2).

to be complex and dynamic rather than fixed. In short, whereas evaluation for accountability engages a set of actors removed from the project by several degrees, operational evaluation is a process of learning in action, through critical reflection on practice, primarily by those directly involved with the project.

Operational evaluation also has its strengths and weaknesses. The primary strength of this process is that it encourages and rewards self-critical analysis of the project by the project officers themselves, who draw on intimate local knowledge about the plantation resident communities. Internal analysis challenges what Schwandt (2000b) calls the "hegemony of method," or the dominant use of technical instruments to describe social reality. As a field-based activity, it strengthens the analytical capacity of officers; problems and constraints are identified, their causes inferred, and changes to activities planned. Rather than create dependency on external monitors to point out failures, effective operational evaluation processes encourage the internal development of relevant knowledge about the project through praxis. Indicator 223 (improving employment alternatives), for instance, accounts for success only in terms of increasing the number of loans given to plantation community residents, and not for the repayment or the productivity of the loans. The Micro-Enterprise Development Project Officer works beyond the indicator to identify the reasons for non-repayment and assists beneficiaries to overcome obstacles to making effective use of credit (Thanakumar, 2006). In the course of operational evaluation, the technical indicators of project success serve as a project background and the practical aspects of building individual capacity assume a greater importance.

The exclusive use of operational evaluation can encourage a preoccupation with project activities and a neglect of longer-term strategy and perspective, missing the proverbial forest for the trees. This is acknowledged by one PCP project officer, who reflects that "both [formal and informal evaluation] systems are essential, and you should not restrict yourself to the technical LFA, nor should you just restrict yourself to informal monitoring" because "all the informal models have to fit into a logical form" (Perera, 2006). While operational evaluation produces relevant knowledge, the specificity of these lessons learned can be unintelligible to those not intimately involved with the project – which makes it difficult to produce more general knowledge about development programming. Furthermore, informal, dialogic processes of monitoring and evaluation lack a clear method, and often rely on anecdotal evidence that is fallible and impressionistic. As Lipsey remarks in this respect:

> Various cognitive and emotional biases, ambiguity about the experiences of different actors in the situation, and limited feedback on the consequences of actions taken all challenge the ability of everyday knowledge strategies to confidently assess whether attempts to help are actually beneficial (2000, p. 222).

Practical methods lack the scientific rigour of data collection, evaluation and comparison, and leave the credibility of the project and its achievements open to challenge.

5. CONCLUSIONS

In this paper we have explored the terrain of evaluation processes in development practice through the lens of the WUSC Plantation Communities Project in Sri Lanka. We have attempted to simultaneously introduce evaluation methodologies and assess their implications within the PCP, and our intention in doing so has been heuristic rather than prescriptive. The relationship between evaluation for accountability and operational evaluation does not necessitate choosing one or the other; the system of international development assistance requires both practices. Deciding the balance between these complementary approaches to evaluation is a matter of prioritizing needs, assessing organizational capacity and choosing where to focus time and energy.

Technical reporting standards may be necessary to meet the accountability demands on governments that offer development assistance, however, this article questions whether the information gathered in this way is always useful. In attempting to meet a donor's demand for results, logical framework analysis often obscures or simply fails to capture the complex social changes wrought by a development project. Planning, implementing and evaluating social changes is rarely a logical process that can be easily managed and rationalized. While formal reporting standards encourage those implementing the project to maintain focus, they often force post hoc justification for actions and the production of misleading narratives about processes of social change. Technical reporting is not only resource-intensive - in terms of both financial and human resources - it is also limited in its substantive contribution to understanding dynamic social processes.

Through a classification of evaluation processes according to *how* they are carried out and for *whom*, compelling questions emerge about the nature of evaluation and its role in development practice. For instance,

when reporting on a project, how can an organization balance a need to be self-critical about what it does, while at the same time representing its work as positive and successful? Furthermore, accountability and transparency are frequently lauded virtues of public administration, but what are the limits of accountability? What practical and ethical issues are involved in determining an acceptable degree of accountability? Also, in the process of operational evaluation, to what extent is a project sustained by an unquestioned logic of intervention? How do development practitioners become "students and researchers of their own evaluative practices" (Schwandt, 2000a, p. 218)? These questions illustrate some of the tensions that characterize the enterprise of international development itself.

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Appendix 1: Canadian Interviews and Questionnaires February/March 2006

Personal Interviews

Person	Position	Interview Date	Location
Barbara Levine	WUSC Director of Overseas Programmes	20 February 2006	Ottawa
Kathy Hughes	Former WUSC Manager of Asia Programmes	20 February 2006	Ottawa
Kathryn Zimmer	CIDA Project Officer in charge of Sri Lanka	20 February 2006	Hull
Satianan Debidin	CIDA Asia Branch RBM Manager	21 February 2006	Hull
Harley Johnson	External Governance Monitor and Technical Advisor for CIDA in Sri Lanka	21 February 2006	Montreal

Phone Interviews

Person	Position	Interview Date
Bill Duggan	PCP Director	10 February 2006
Marnie Girvan	Former CIDA Head of Aid in Sri Lanka	15 February 2006
Lesley Ouimet	WUSC Sr. Project Officer, Asia Programmes.	15 February 2006
Shyamala Sivagurunathan	CIDA Project Support Unit Director in Sri Lanka	22 March 2006

Questionnaires

Person	Position	Date Completed
Doug Graham	WUSC Country Director - Sri Lanka	5 March 2006
Aneesa Walji	Student Intern with PCP (2004-5)	3 March 2006
Lara Tcholakian	Former WUSC Project officer	7 March 2006
WUSC PCP Questionnaires on RBM	6 PCP Project Officers	6 March 2006

Appendix 2: Sri Lanka Field Research Itinerary, May 2006

10 May 2006	Joined PCP staff meeting to observe monitoring, reporting, and planning – WUSC office in Kandy
	Interviewed: Rathna Jeganathan (Senior Project Officer-Industrial Relations) & S. Ramar (Project Officer-Capacity Building) – WUSC office in Kandy
11 May 2006	Interviewed: Ms. S. Nalee (Senior Project Officer-Vocational Training), Ms. Stella Victor (Senior Project Officer-GAD), D. Thanakumar (Project Officer-MED), Alex Balasanthiran (Deputy Director), Sarah Barkley (Intern), T.M. Bala (Project Officer-Basic Rights) – WUSC office in Kandy
12 May 2006	Attended women's programme at Barcaple estate with Stella (SPO-GAD) and R. Vidyatharan (field-based Animator)
	Observation of worker housing, informal discussions with Stella, informal discussions with workers, plantation manager, and WUSC GAD mobilizers – Barcaple Estate
15 May 2006	Interviewed Mr. Janaka Jayawarna (Manager of Sheen Plantation) – Sheen Estate
	Met with Dunsinane Estate Worker Housing Cooperative Society and informally interviewed WUSC GAD mobilizer and EWHCS accountant – Dunsinane estate
16 May 2006	Attended Plantation Communities Development Partners Meeting (PHDT Office-Kandy) as observers and debriefed with Alex Balasanthiran
17 May 2006	Interviewed Mr. Bowatte (Regional Director. PHDT-N'Eliya and Hatton) and Ms. Thiyagarajah Tegapriya (PHDT Social Mobilizer) – PHDT Hatton office
	Interviewed Mr. G. S. Jayasundanra (Section Head - Infrastructure – PALM Foundation) and informally interviewed K. Krishnakanth (field-based Animator – Nuwara Eliya) – PALM office in Nuwara Eliya
18 May 2006	Interviewed Ms. Faith Manikkam (CEO – CINDA) and informally interviewed participants in a sewing course co-funded by WUSC at CINDA – CINDA centre in Nuwara Eliya
	Interviewed Mr. Ananda Supasingha (Assistant Manager of Glassaugh Estate), informally interviewed WUSC GAD mobilizer and members of the EWHCS at Glassaugh - Glassaugh Estate (Nuwara Eliya region)
	Informally interviewed WUSC-sponsored micro-entrepreneur, interviewed Mr. M.S. Nasaiah (Chief Clerk – Uda Radella Estate) and met with WUSC-trained BC/NIC volunteers, Occupational Health and Safety volunteers, Estate Mid-Wife, and Social Welfare officer. – Uda Radella Estate (Nuwara Eliya region)
19 May 2006	Visited Craighead Estate on WUSC staff study tour: Learned how to pick tea and informally interviewed Roshan Rajadurai (Director of Kalawatte Estates)
20 May 2006	Met with WUSC GAD mobilizer, Medical Officer, Social Welfare Officer, and Crèche Director at Ferham Estate. Interviewed Mr. Wickramasinghe (Estate Manager) – Ferham Estate
22 May 2006	Interviewed Mr. Mervyn Perera (Regional Director PHDT-Kandy)
	Interviewed Mr. Bill Duggan (Field Director – WUSC PCP) and Ms. Yoga Perera (Senior Project Officer-Capacity Building) – Kandy.
24 May 2006	Interviewed Mr. Doug Graham (Country Director-WUSC) – Colombo

Book Review:
Development After Globalization: Theory And Practice For The Embattled South In A New Imperial Age

Mark N. Nabeta & Daniel Lubavin

ABSTRACT – *In our day and age, many authors have come forth to discuss the various forms of resistance to the expansion of the neo-liberal agenda. In his book* Development After Globalization: Theory and Practice for the Embattled South in a New Imperial Age*, John Saul offers a socialist-Marxist vision and perspective, not only on the problems faced by the global community, but also on possible forms of resistance to the Western capitalist project. A Political Science professor at York University in Canada, he uses political economy theory to explain and illustrate his position, aiming to lay out a set of directives and blueprints to enable his readership to fully fathom the challenges on the horizon, while also encouraging them to take action in opposing global capitalist expansion. This article is a review of the aforementioned scholarly publication, offering an analysis of its content combined with a presentation and discussion of the author's arguments. This review aims to involve the prospective reader in a critical engagement with the book's premise and coverage, as well as provide an overview of Saul's stance on the current neoliberal project and his outlook on the future.*

For over fifty years, the process of "development" has been a pivotal topic within academic circles, as well as the cause of numerous debates and discussions. With the collapse of the Soviet Bloc, and in line with Fukuyama's "End of History," various thinkers have come forth to present the global neoliberal and capitalist system as the sole framework capable of sustaining the development project. It is, however, undeniable that in our contemporary times we are still witnessing underdevelopment in its deepest forms, exemplified by increasing poverty gaps, environmental degradation, and civil unrest. In light of these circumstances, author-activists such as John Saul have relentlessly worked to bring back leftist ideas in both university classrooms and intellectual circles through supporting new forms of resistance and the formation of new social movements around the globe.

A professor at York University in Canada, Saul has been extremely active politically, documenting and helping to organize numerous liberation struggles, particularly in Southern Africa. In his book *Development After Globalization: Theory and Practice for the Embattled South in a New Imperial Age*, he attempts to reclaim the spirit of socialist-Marxist thought and strengthen leftist visions of a possible world - one free of class struggle - as well as detail the shortcomings and subsequent abuses of global neoliberal capitalism. His main argument is that there needs to be a thorough understanding and analysis of the capitalist system through a leftist lens, which in turn will feed the struggle to overthrow capitalism's flawed logic and, as the author explains, create "the condition necessary for human emancipation" (Saul, 2006, p.61). His analysis is grounded in personal accounts and scholarly references, which reflect his views on the global system and its contradictions.

With this scholarly publication, Saul vocally attempts to reach a new readership. Targeting academics of the Global South, particularly those in India and of Indian descent, he focuses his rhetoric, writing and the book content around complex development-related issues and advanced Political Economy theory. Considering his position in the global balance of power (as a male Caucasian intellectual, vis-à-vis his counterparts in the Southern world), there exists the potential for his views to be tainted with Western biases. Nonetheless, Saul does a sensitive and commendable job of steering clear of such biases by using examples and opinions that are directly related to his experiences in Southern Africa. Furthermore, it appears that he strategically chose to focus on Indian readers since the Indian economy and market is currently in full expansion – which makes

it the ideal target for the expansion of the neoliberal agenda. This book therefore serves as a tool and set of advisements to enable them to protect themselves from the threat globalized Western imperialism and capitalism.

In the first and only co-authored chapter of the book, John Saul and Colin Leys introduce the reader to the dependency school of thought. They draw an academic history of the theoretical perspective while presenting its proponents, characteristics, assumptions and various interpretations from scholars such as Andre Gunder Frank, Bill Warren and Raul Prebisch. Saul and Leys explain how this view of the world and the notion of "underdevelopment" are essential in understanding the economic and subsequent socio-political subordination that still staggers the Global South today (Saul, 2006, p.10).

The second chapter deals with the notions of globalization, Development[1] and imperialism that are intrinsically linked to the concept of global capitalism and the expansion of the neoliberal agenda. Saul deconstructs development practitioners' and economists' "common tendency [of] diagnosing" the systemic inequalities of global capitalism through "false binaries" ("the geographical" versus "the social", "globalization" versus "the state," etc…) (Saul, 2006, p.20) that serves to detract attention from the deeply rooted issues embedded in the capitalist project on a global scale. The author then lists opposing views to the neoliberal agenda, held by numerous reformists such as Robert Biel.

The third chapter deals with the concepts central to socialist-Marxism while engaging in debate over the validity of the theory above numerous others, such as anarchism, oppositional postmodernism, and "radical democracy" (Saul, 2006, p.53). Through a Marxist lens, it offers a vision on issues of oppression experienced by the people of the Global South - through processes such as racial discrimination, gender inequality, ethno-nationalism and economic marginalization, among others. In fact, Saul frames these issues as fitting into an overarching framework of generalized class struggle within the global neoliberal system. The author explains thusly that a socialist analysis is necessary to repel the negative impact of the capitalist project on humanity (Saul, 2006, p.54-55).

Lastly, the fourth and final chapter of this book deals with forms of intellectual and political resistance and the various social movements that struggle against the harmful effects of neoliberalism on societies around the globe (Saul, 2006, p.89). Primarily referencing his terrain of expertise – Southern Africa and its various political structures - Saul presents a variety of perspectives and paths through which oppression has been challenged (mostly notably by the liberation movements of Southern Africa) and uses them as a source of inspiration towards future attempts at achieving sustainable change.

The writing style in this book is at times very straightforward but can become complicated as the author struggles to fit together multiple descriptions of his ideas. In elaborating his thoughts, Saul cites various authors and thinkers that may contribute to the overall discussion of how capitalism impacts global marginalized communities. However, not all the authors cited support Saul; rather, they are used to offer an alternate perspective, a critique of leftist visions or simply to further the discussion as if it were a plot developed in a literary novel. This writing style makes the text at times both varied and convoluted, since opposing ideas (about empire, 'Development', and Marxism) clash in Saul's efforts to explain and expand the issues. For instance, relating to the topic of imperialism, the author neglects the presentation of his own personal opinion on the theory, choosing instead to introduce the visions of "empire" discussed by Petras, and contrast them to that of "Empire" argued for by Hardt and Negri (Saul, 2006, p.26). The main arguments are still clearly defined, but his discussion can sound vague and unexplained as he jumps in and out of different authors' words in an attempt to offer competing perspectives.

Saul is at his best when dealing with core Marxist ideology and analysis. This is evident in his analysis of various instances of social, racial, ethnic and religious anti-imperialist opposition as fitting in the spectrum of class struggle and resistance to Western imperialism and its resulting oppressions. For example, coupling dependency theory with his own personal knowledge of racial divisions in South Africa, he parallels the "intersection of class and race" with the dichotomies created by the metropolis and the periphery model (Saul, 2006, p.72). Indeed, the metropolis - usually understood as a Western, white-dominated, wealthy nation - creates the conditions that lead the periphery - composed of mostly economically and politically marginalized, non-white populations - to remain in a subservient and impoverished position, duplicating a Marxist vision of "bourgeoisie" and "proletariat" on the global economic scale.

Furthermore, he uses the example of religious opposition to Western imperialism to really denote a rare perspective on the aforementioned dichotomy. He cites several religious nationalist struggles around the globe

1 The capitalized term "Development" refers to the manner in which development is conducted and approached on an international and mainstream scale. That includes its practical, institutional and theoretical approaches.

as examples of the contestation of the "universalism of capitalist modernity;" such universalism, he states, is intolerant of the diversity or integrity of the "local" and "sacred" (Saul, 2006, p.86). These points strengthen his argument and provide concrete, relevant examples to all of his readers (particularly to his readership in the Global South).

While addressing the various vforms of struggle and points of contention created by the global capitalist framework, Saul fails to offer a clear environmentally sensitive analysis at any point in his book. Indeed, although he does mention the concerns and issues raised by the ecological community, such as widespread environmental destruction and the concrete threat of global warming (see Saul, 2006, p.55), he fails to elaborate on these fully. This would have offered a more nuanced and holistic dimension to the arguments he raises about the benefits of Marxism.

With this book, John Saul achieves his intended goal of introducing socialist-Marxist ideology to a new readership through a contemporary lens. Overall, it is a great account of the inherent shortcomings of capitalism, but also of the challenges to socialist thought. Although the writing style and tone are truly formal and academically grounded, he at times attempts to loosen the mood by using terms such as "Ms. Marxist" and "Mr. Socialist" (Saul, 2006, p.53), and referring to postmodernists as "posties" (Saul, 2006, p.61). This book, however, remains directed toward an academic readership that is already familiar with theories of development and Political Economy; this can be seen primarily through his lack of elaboration on the various schools of thought and theoretical perspectives he mentions throughout this offering. Nonetheless, we believe Saul does create a very interesting presentation of the global resistance to the capitalist project, as well as its relevance to socialist-Marxist thought. He does this while also offering an adequate delivery of leftist visions of development and the possibility for unity amongst the diverse oppositional forces to globalization and imperialism. We recommend this book to a reader that is familiar with Marxist ideology, and who is interested in understanding how it offers the tools for efficient and successful resistance to the oppressive nature of capitalism and the threat of globalized Western imperialism.

REFERENCE

Saul, John (2006). *Development After Globalization: Theory And Practice For The Embattled South In A New Imperial Age.* Zed Books Ltd.: New York City, New York.

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Grace Baey is completing her degree in International Development Studies and Geography at the University of Western Ontario. She works at the confluence of these disciplines in her efforts to gain critical understanding of how uneven geographies are (re)produced within contemporary systems of aid and development, as well as their dominant associated discourses. Her current undergraduate research deals with the ways in which development problems in Africa are discursively performed and represented in Canadian mass media. Broadly speaking, her research interests pertain to post-colonial theory, imaginative geographies, development discourse and cultural studies.
Acknowledgments: I am indebted to Dr. Mark Franke for his valuable insights in class on the subject of critical refugee studies. I also thank Jenn L. Harris and two other anonymous reviewers for their constructive feedback.

Karina Barker recently completed her undergraduate degree in International Development and Globalization at the University of Ottawa and is hoping to pursue an MA in the fall of 2008. She is particularly interested in social change, social movements, feminist and gender theory, and alternative development discourse. Karina can be contacted at karina_barker@hotmail.com.
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Acknowledgments: Dr. Schafer and Maya Berinzon for their invaluable input and editing.

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Dave Campanella graduated from the University of Waterloo in 2007; he received his BES in Environment and Resource studies with a minor in economics. He hopes to continue his studies beginning in 2008 with a Master's degree in either international studies or environmental studies. Although his academic interests are quite broad, they share a unifying factor of wanting to contribute to shaping a global society that is economically sufficient, socially just, and ecologically sustainable. He can be reached at djcampan@fes.uwaterloo.ca.
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Beth Hayward graduated from Queen's University in 2007 with a BA (Honours) in Development Studies and History. She is now living in Lusaka, Zambia working for (but mostly learning from) a local gender-focused NGO called Women for Change. Beth is fascinated by the complex issues that lie at the intersection of gender, health and development in urban Southern African contexts. In particular, her varied research interests currently include rights-based approaches to sexual and reproductive health, socially constructed understandings of health and the body, 'North-South' civil society partnerships, post-colonial historiography and participatory grassroots development methodologies. Next year, she hopes to pursue a master's degree in Development Studies.
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Daniel Lubavin is a fourth year Specialized Honours International Development Studies major. He has been interested in issues of equality, justice, fairness, suffering, and poverty among other social issues for a number of years and chose to study them at York University's IDS program. After three years in the program, Daniel decided to abstain from participating in the development process to pursue spiritual goals. His projected year of graduation is 2009. He can be contacted at dinbabwa@hotmail.com.
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Katie Palmer is an undergraduate student at the University of Toronto. She is completing her honours degree in Women's Studies and Geography. She plans to pursue graduate studies at the University of Toronto. Her academic interests include the trafficking of refugees for the purpose of sexual enslavement as well as the experiences of Filipina domestic workers in host countries. She can be contacted at katie.palmer@utoronto.ca
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