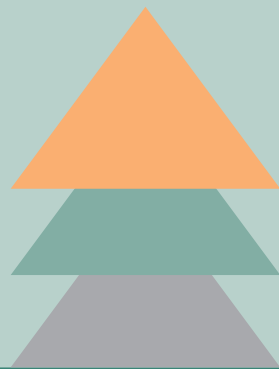


# Religions and Development Research Programme

## **A Guide to Analyzing the Relationships between Religion and Development**

**Carole Rakodi**

International Development Department,  
University of Birmingham



Working Paper 67 - 2011



# Religions and Development

## Research Programme

The Religions and Development Research Programme Consortium is an international research partnership that is exploring the relationships between several major world religions, development in low-income countries and poverty reduction. The programme is comprised of a series of comparative research projects that are addressing the following questions:

- How do religious values and beliefs drive the actions and interactions of individuals and faith-based organisations?
- How do religious values and beliefs and religious organisations influence the relationships between states and societies?
- In what ways do faith communities interact with development actors and what are the outcomes with respect to the achievement of development goals?

The research aims to provide knowledge and tools to enable dialogue between development partners and contribute to the achievement of development goals. We believe that our role as researchers is not to make judgements about the truth or desirability of particular values or beliefs, nor is it to urge a greater or lesser role for religion in achieving development objectives. Instead, our aim is to produce systematic and reliable knowledge and better understanding of the social world.

The research focuses on four countries (India, Pakistan, Nigeria and Tanzania), enabling the research team to study most of the major world religions: Christianity, Islam, Hinduism, Sikhism, Buddhism and African traditional belief systems. The research projects will compare two or more of the focus countries, regions within the countries, different religious traditions and selected development activities and policies.

The consortium consists of six research partner organisations, each of which is working with other researchers in the four focus countries:

- University of Birmingham, UK: International Development Department, Department of Theology and Religion, Centre for West African Studies, Centre for the Study of Global Ethics.
- University of Bath, UK: Centre for Development Studies.
- Indian Institute of Dalit Studies, New Delhi.
- Nigerian Institute of Social and Economic Research, Ibadan.
- University of Dar es Salaam, Tanzania.
- Lahore University of Management Sciences, Pakistan.

In addition to the research partners, links have been forged with non-academic and non-government bodies, including Islamic Relief.

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**Carole Rakodi**

Director, Religions and Development Research Programme  
International Development Department, University of Birmingham

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# Summary

## Introduction

In mainstream development thinking, policy and practice, religion has generally been neglected, despite its pervasiveness and importance. This guide addresses the question – ***how can the presence, nature and activities of religious people and organizations best be understood and taken into account in the course of development activities?*** It is written from the perspective of development, but ‘religion’ and ‘development’ are intertwined – they are not separate spheres of life. The links between them are complex and each influences the other.

### An analytical framework

- identifies and clarifies the key concepts and factors that need to be considered in any attempt to understand the social world.
- identifies key questions that need to be addressed to understand the relevant factors in a particular setting and to assess how they are related to each.
- suggests how the characteristics of potentially important factors and the interactions between them might be studied.

This guide ***aims*** to provide guidance on how to better understand the links between religion and development, to inform development policy and practice – it can be used by itself or in conjunction with political economy analysis, gender and social exclusion analysis, or analyses of power and change. Such an analysis can improve understanding of a geographical area (country, locality), assist in devising sectoral programmes and contribute to the development of interventions to address social exclusion and poverty. It can also be useful in improving mutual understanding between religious bodies and their adherents, and between religious and development actors, perhaps through translation into educational and training materials.

The guide is divided into five sections, each of which is summarized below and explained in more detail in the main paper:

- identifies and clarifies some key concepts and issues
- explores ideas about the relevance of religion to development and social change
- identifies the broad levels of analysis needed for understanding a particular context, suggesting possible questions for investigation



- discusses some possible approaches and tools for use in the analysis, and
- identifies sources of further information.

## Clarifying the concepts

Religious and other organizations using this guide may not be aware of contemporary development thinking, so first some key development concepts are considered, including some of the dimensions of social difference that affect wellbeing, poverty and social exclusion, including gender. Development agencies often have little understanding of 'religion', so this and some important associated concepts are then clarified.

### *Development, poverty and social exclusion*

#### ■ Development

At a minimum, development is movement from a worse state to a better one. For a society to develop, it must improve in some relevant way. However, the standards of relevance are far from clear, so it is not possible to know whether development has occurred without a conception of its end or ends.

There is little consensus about what these ends may be, although there is widespread agreement that they are based on some concept of wellbeing. 'Development', therefore, should reflect people's ideas about how they would like to improve their wellbeing, social organizations' views about how societies should be improved and the aims and aspirations of national governments. Strategies for achieving it and their outcomes are judged by each of these sets of actors against their own aspirations.

'Development' is, therefore, not a monolithic idea with a single, universally accepted definition – understandings of and ideas about development are socially constructed, by the citizens of 'developing' countries, governments, development agencies and critics. In addition, different interests within each of these groups are likely to have different views. Furthermore, ideas about what constitutes development and how to achieve it have changed in the light of experience and in response to challenges to dominant ideas and sets of policies.

The invisibility of religion in mainstream development theory and practice can be attributed to both the secularization of the state and society that was supposedly occurring, especially in Europe, and to modernization theory, which was associated with the view that 'religion' is associated with 'tradition'

and therefore would (and should) disappear from the public sphere. The neglect of religion was reinforced by the ascendance of neo-liberal economic ideas in the 1980s, associated with a renewed emphasis on economic growth, reliance on the market, and a reduced role for the state. However, achievement fell short of expectations and poverty increased, leading to a reconsideration of the predominant development model (the ‘Washington consensus’).

Today, the most widely accepted concept of *human development* incorporates both economic growth and the creation of an enabling environment for people to live long, healthy and creative lives. This involves wide distribution of the benefits of economic growth; access to assets, livelihoods and services; and physical and economic security. Improvements to wellbeing imply not just increased material resources and incomes, but also realization of rights, access to opportunities and the capacity to make the most of them.

There is general consensus on these aims, but less agreement about how to achieve them. Critics (including some from various religious traditions) continue to challenge the ongoing emphasis on economic growth, reliance on markets, intensified resource exploitation, modernization and promotion of individual rights.

#### ■ Poverty, wellbeing and social exclusion

Evolving ideas about and approaches to development have implications for conceptions of **poverty**. Conventionally, especially in economics, it is understood in terms of the income necessary to buy a basket of basic goods (food, services, shelter etc). Poverty is defined as a shortfall in income or consumption from the poverty line (for individuals or households), defined in absolute or relative terms. Such a monetary approach to defining and measuring poverty has value in development policy, but does not capture other dimensions, including people’s inability to live the lives they value, which are characterized by knowledge, good nourishment and good health. Nor does it identify the transmission mechanisms through which impoverishment occurs and poverty is perpetuated, especially unequal access to political, social and economic resources.

Development policy should therefore aim at more than reducing the proportion of people with income or consumption levels that exceed the poverty line. Instead, it should aim at improving people’s **wellbeing**. Wellbeing is a multidimensional concept, with material, subjective and relational

dimensions. It acknowledges the importance of an adequate income, a good quality of life, supportive social relations and a sense of a dignified self, based on cultural ideas and resources. It also recognizes that access to these dimensions depends on social and political relationships.

That these often favour some social groups at the expense of others is recognized in the idea of **social exclusion**, which refers to the processes by which people are denied access to the resources necessary to improve their wellbeing, including discrimination, political under-representation and regressive policies. Dimensions of social difference that are associated with exclusion include gender, ethnicity and caste. These operate alongside, counteract or are reinforced by religious identity.

#### ■ Gender, ethnicity and caste

Unlike sex, which denotes the biological differences between men and women, **gender** refers to the social construction of masculine and feminine roles and identities. Women's roles in production and reproduction and their often disadvantaged position in society are created and sustained through gender relationships characterized by patriarchy, which refers to a social system in which men are the primary authority figures; have control over women, children, and property; and are privileged, while women are subordinated.

Religion influences gender relations in the wider society and patriarchy influences the expression and organization of religion. Like other forms of social organization, religious organizations are gendered in terms of their leadership, staffing and membership. They often limit the roles that women can play, prevent them from assuming positions of responsibility and define them in terms of their domestic responsibilities. The exclusion of women from leadership positions in many religious traditions and organizations means that they lack the status and authority to challenge negative attitudes and practices. However, women also reinterpret religious traditions, and participation in religious organizations may provide them with skills and social resources, so religion may be empowering as well as oppressive.

As well as playing important roles in people's religious and social lives, religious organizations are active in service delivery and development, so the ways in which gender influences their priorities, choice of activities, design of programmes and organizational characteristics is potentially significant:

**Ethnicity** may be regarded as a cultural given, an identity that can change and be manipulated, or some combination of the two. Members of an ethnic group share a core territory, culture, language, identity, traditions and various social practices. Ethnic groups may be quite fluid and differentiated. However, in the absence of other loyalties (e.g. class) and because politics is often seen as a zero sum struggle for political power and economic resources, ethnic identity can be mobilized for political purposes.

Some associations concerned with the welfare of their members are based on ethnicity. More generally, ethnic organizations seek to advance the identity and wellbeing of the group as a whole, although some ethnic groups (for example minority groups) may not succeed in achieving this goal. Experience of discrimination, struggles for recognition and equality, and ethnically based political rivalry may harden members' sense of identity. Ethnic identity may also be reinforced if it coincides with other aspects of a person's identity, such as religion, exacerbating ethnic, religious and political rivalry.

**Caste** in South Asia, especially India, is based on *jati* (a birth status group). It is closely associated with the Hindu religion, but is also the basis for wider social stratification, with Muslims, Buddhists, Christians and Sikhs also observing aspects of caste-related behaviour. It is associated with rules that maintain caste distinctions, hierarchy (typically portraying Brahmins at the top and Dalits – former Untouchables – at the bottom) and a division of labour in which caste is associated with occupation. While today caste is less important than before in terms of the external markers of caste identity and economic well-being, especially in urban areas, it has become an important basis for political mobilization.

Since the 1930s in India, positive discrimination policies have sought to counteract the disadvantage associated with membership of certain caste and other groups. Places in educational institutions, a share of formal employment and seats in elected bodies have been reserved for people belonging to castes considered to be economically and socially 'backward'. Although reservation has enabled members of disadvantaged castes and Dalits to gain access to economic and political opportunities, it has also reinforced and politicized caste identities. Today, therefore, although the significance of caste is disputed, many conceive of it as a structural principle of society, which acts as a basis for interest articulation, collective mobilization and competition for resources.

## ***Religion, culture and secularism***

### ■ Religion

There is no agreed definition of **religion**:

- substantive definitions concentrate on what religion **is** (particularly belief in a transcendental reality or spiritual being (the sacred), religiosity (signified by adherence to a set of beliefs and practices) and affiliation with a religious organization.
- functional definitions are concerned with what religion **does**: the roles it plays in the construction of people's worldviews and social relationships, and in wider socio-political organization, which may be regarded as negative or positive.

Critics of purely functional or substantive definitions argue for a concept of religion that contains elements of both. Religion and the English words used to talk about it, such as faith or belief, do not necessarily translate directly into other religious traditions and languages, leading some to argue that the concept itself does not adequately capture the diversity of beliefs and practices associated with other traditions (see Box 4 in the main paper). In addition to the challenges posed by translating concepts and ideas associated with one religion or language to others, contemporary disciplinary boundaries are arbitrary products of the European Enlightenment. Different disciplines, ranging from the 'insider' disciplines of theology or religious studies to the supposedly objective social science disciplines, have different conceptions of knowledge, different understandings of religion and different ways of studying it.

Essentially, religion is said to be a set of core beliefs and teachings that among other things specify (or suggest) how to live in accordance with the principles of the faith tradition and how society should be ordered. Religious teachings are thus promoted by religious organizations, embodied in people's lives, and constantly reinterpreted and acted upon in the context in which they live. Religion has many dimensions, including

- belief (that texts or propositions are true)
- right practice (living out religious injunctions)
- spirituality/mysticism (personal religious or mystical experience that is attributed to awareness or experience of god/gods, the spiritual or the sacred) and
- ritual.

The emphasis placed on each of these varies between the religious traditions. Christianity is traditionally said to put more emphasis on beliefs, influencing European colonists' assumptions about the nature of other religions, whereas Islam emphasizes detailed rules to guide behaviour over elaborate statements of belief, and Hinduism and Buddhism concentrate on ritual practices and personal transformation rather than uniformity of belief.

In addition, the view of religion as a set of core teachings and beliefs implies that the boundaries between traditions, sects, schools of thought or denominations are clear, whereas in practice they are often blurred. In particular, followers often retain elements of earlier belief systems, such as folk religion or pre-conversion beliefs and practices. For example, many Muslims and Christians in Africa continue to hold traditional beliefs (such as a belief in witchcraft) and to practise traditional rituals; while many Buddhist converts from Hinduism in India continue to worship Hindu deities and participate in Hindu rituals.

A religious (or faith) tradition refers to a broad religious movement that to some extent shares a history, culture and common body of teachings, but is generally comprised of more than one sect or denomination, each with more or less distinctive teachings, practices and organizational forms.

A broad definition of **religiosity** refers *how people are religious* (practising rituals, retelling myths, referring to religious symbols, accepting certain beliefs and/or attempting to live in accordance with religious moral and ethical injunctions). However, it is more often used in a narrow sense to denote *how religious people are*, with respect to various dimensions of religion, for example, how frequently they engage in various religious practices. Religiosity interpreted in this way has been the focus of many quantitative studies that seek to ascertain whether it is correlated with other dimensions of people's lives (for example, happiness or personal behaviour) or with characteristics of the societies in which people live (for example social cohesion or rates of economic growth).

While religiosity in the sense of the public observance of religion has declined in most European countries, it has remained high elsewhere and appears to have become more common and overt in recent years in some parts of the world, as seen, for example, from figures for frequency of attendance at religious services (see Box 5).

**Religious organization** refers to the ways in which different religious traditions, sects and denominations are organized. It varies (see Box 6), depending on:

- the nature of religious leadership and how the religious body relates to the state
- the relative importance and roles of lay people, religious specialists and paid clergy
- the ways in which teachings are transmitted and financial support for the religious organization is secured
- the scale, scope and nature of welfare and other services provided.

Religious organization is influenced by the origins of a tradition, its early experiences, and its subsequent expansion, splits and reforms. The arrangements include local congregations, wider structures and organizations with more or less autonomy from the main religious body. Many analyses of religion neglect these aspects, yet understanding their nature and significance, and the similarities and differences between religious traditions, is important when considering the actual and potential role of religious organizations in development.

- **Congregations:** local congregations are generally the focus for adherents' ritual practices, a venue for learning about the religious tradition, and the level at which religiously mandated giving is organized. In addition to religious services, local congregations may provide social capital and practical assistance to their own members, expect service from those members and provide welfare services to the needy in the wider community.
- **Wider structures:** The ways in which local congregations fit into wider local, regional, national and international structures varies between and within the faith traditions. The arrangements influence how decisions are taken, funds raised and allocated, leadership exercised, and staff recruited and supported. Some have evolved a formal hierarchical structure (for example, the established Christian denominations), while others are loosely and informally organized.
- **Other religious organizations:** most religious traditions have spawned a variety of other organizations, with differing purposes, degrees of autonomy and sources of funding. They are linked to each other and the main religious organizations in different ways, with implications for coordination, control and accountability.

In recent years, governments and development agencies have paid increased attention to the actual and potential role of 'faith-based organizations' in development, because of their supposed comparative advantages. For a variety of reasons, it is not possible to provide a single answer to the

question: *Do FBOs have a comparative advantage in achieving development objectives?* Instead, it is more sensible to ask whether and how religious organizations make *distinctive* contributions to development and service delivery (see below).

## ■ Culture

A further complication in developing an understanding of religion and its role in development is the struggle to distinguish between religion and culture, which itself has various dimensions:

- a distinctive set of practices
- a system of values and attitudes that sustains a way of life
- the evolving shared values, ideas and norms through which members of a group deal with each other, outsiders and their environment.

It is probably impossible to analyze religion and culture separately. Generally, religious beliefs, specifically a notion of the sacred, impact on people's socio-cultural identities, relations and practices, and influence everyday life. But culture also influences the shape of religious spaces and the identities and practices associated with them.

Some approaches to development consider culture to be unimportant. These adopt materialistic ways of looking at the world, which assert the primacy of material things in determining human behaviour, rather than ideas or beliefs. They are associated especially with liberal economics. Critics assert that economists only bring in culture as an explanation when economic hypotheses are contradicted by the evidence, although there is also a danger in the opposite view – that the only things that matter are ideas and beliefs.

The failure of many development policies and projects has been attributed to their incompatibility with local culture. In response, socio-cultural compatibility has been urged on policy and project designers – the need to take into account people's values, aspirations, attitudes and beliefs. However, there is a danger that in the process, less desirable aspects of cultures, such as discrimination on the basis of gender or age, will be ignored or behaviour said to be 'culturally based', such as favouring some people over others, will threaten the achievement of development objectives such as good governance.



## ■ Values and beliefs

Religion is an important source of values (the principles on which people draw to make moral/ethical decisions) and beliefs (which refer to the cosmological lens through which people understand the world and their place within it). Religion is not the only source of values: not only do non-believers have values, but also adherents' values are influenced by cultural traditions, global influences and trends such as increased consumerism. In some religions, beliefs and moral values are believed to be the commands of God, but there are still questions about how they are to be discovered and interpreted. In some cases, notably *Shari'a*, moral codes have been developed into bodies of law.

All religious traditions have developed means of transmitting values to their followers, ways of encouraging conformity and sanctions for non-conforming behaviour. Values and morals/ethics influence attitudes and behaviour, but these are also influenced by many other factors. In addition, the links are often not clear and can only be studied indirectly, for example by discerning the interpretations people place on myths, rituals and symbols.

In contrast to those beliefs and practices associated with a particular 'folk', which by definition are not applicable to members of other communities, religions that claim superior or universal truths generally seek to persuade others to accept those truths. Not only are adherents expected to witness to their religious beliefs and values through their religious practices and daily lives, they are also expected to spread the religion (evangelism in Christianity or *dawa'ah* in Islam). It is useful to distinguish between voluntary and induced or forced conversion – none of the religious traditions approve of the latter, but in practice the dividing line may be blurred. The priority given to seeking converts has influenced the historical spread of religions, with significant implications for post-independence politics, social relations and attitudes to religious expansionism.

## ■ Secularization and secularism

The idea of the secular is perhaps the mirror image of religion.

- **Secularization** refers to the declining prevalence of religious beliefs and adherence to a faith tradition, as well as the reduced roles played and influence exerted by religion in the public and private spheres
- **Secularism** denotes political arrangements in which religious organizations play no official role in the machinery of the state.

Islamic scholars believe that to enable human beings to fulfil the purpose of creation (to worship God), a state (Caliphate) governed by Islamic law is necessary, although not all Muslims agree. In practice, very few political regimes are either purely secular (differentiated) or fully integrate religion with the state. They may instead be placed on a spectrum between strictly secular and theocratic, with their position on the spectrum influencing their reactions to expressions of political identity (such as political parties), the sources of political legitimacy on which they draw and other matters of politics, law and policy. In practice, religion-state relationships change over time, and are more or less contested.

## How is religion relevant to development and social change?

A first step in addressing this issue is to pose two preliminary questions:

- what are development scholars' and practitioners' views of religion?
- what views do religious traditions and believers hold about development?

It is helpful to pose them as separate questions for the purpose of analysis, especially for development or religious actors who have stayed aloof from the other field of belief and action. In practice, of course, many individuals are involved in both religion and development.

Possible approaches to addressing the questions include attempts to identify:

- the relevant teachings of some major faith traditions (see Box 8 for examples)
- models of development based on the views of religious and secular development scholars and practitioners.

Noy (2009) has adopted the second approach, identifying six ideal type models of development from an international survey of religious and secular informants. His analysis shows that, while some actors (religious and other) are associated with some visions and approaches more strongly than others, there is no clear dividing line between 'religious' and 'secular' visions and approaches. Only one of the development models identified is purely secular and materialist, and one focuses largely on ethical, religious and spiritual dimensions of development. The others do not map tidily on to one side or another of a religious/secular divide. Instead, they draw on ideas from both, seeing religious values and practice as providing the ethical basis for secular development activities, and using material approaches to achieve development even when inspired by religious motivations.

Noy concludes that specific religious adherence is not the only or even most important category by which to categorize different development visions. He also notes that the views of individuals within a religious tradition often had more in common with members of other traditions than other members of their own and that where people stand on the liberal/conservative spectrum within a religious tradition seems to be a more important distinguishing factor in their views about development than religion or denomination.

## The analytical framework

An analytical framework for developing a rounded understanding of the links between religion and development has three dimensions:

- a personal dimension that seeks to understand what religion means to individuals and how it informs their views, motivations and actions
- a social dimension concerned with the ways in which religion interacts with social and political processes
- an organizational dimension that focuses on the nature, aims and activities of religious organizations

While each needs to be understood, and the methodological approaches to assembling and analyzing evidence may be different for each, none can be understood in isolation.

Questions that may be helpful to guide the analysis are suggested below, with some illustrations from research conducted during the Religions and Development programme. They are a starting point, rather than exhaustive or appropriate for every situation.

## 1 Everyday religion

- 1.1 How do people understand religion? How do they experience it?
- 1.2 How does it inform their values (and through what channels for socialization and learning)?
- 1.3 How do their religious beliefs inform people's view of what 'development' is (and how important are they compared to other influences e.g. politicians' statements or their experience of development policies and programmes)?
- 1.4 How do people's values inform their views about some key development concerns and principles: poverty, wealth, right social ordering, wellbeing, gender roles and relationships (e.g. gender, equality/inequality, social exclusion, welfare)?

- 1.5 How do these views and the religious teachings that people hear in turn influence their views about how to tackle social and economic problems, such as poverty and inequality? This enquiry could focus on selected issues e.g. access to education for boys and girls, tackling poverty and meeting welfare needs (raising questions about ideas of social justice and charity) and development tools (e.g. microfinance).

## 2 Religions, societies and politics

- 2.1 What are the relationships between religions and societies?
- 2.1.1 How do religious institutions influence culture, social norms and the relations between social groups?
- 2.1.2 Do religious norms and actors support or impede social harmony, equality and justice?
- 2.1.3 In what ways and through what institutions and processes?
- 2.2 What are the relationships between religions, politics and governance?
- 2.2.1 What roles do religious actors play in formal and informal political processes, with what effects?
- 2.2.2 How do religious groups advance their own interests in the political system, with what outcomes?
- 2.2.3 What are the religious dimensions of international relations and how do these affect domestic politics and governance?
- 2.2.4 What implications do the links between politics and religion have for law and policy?
- 2.3 Are religious organizations active in political spaces and civil society arenas?
- 2.3.1 To what extent have they participated in policy consultation processes and advocacy, why, and with what outcomes?
- 2.3.2 How have movements for social change engaged with religious ideas and organizations?
- 2.4 Do violent conflicts have a religious dimension? If so, when, in what circumstances and why?
- 2.4.1 How and why do instigators draw on religious difference or organizations in the perpetration or justification of violence?
- 2.4.2 What explains the occurrence, characteristics and outcomes of inter- or intra-religious violence?
- 2.4.3 What roles do state, religious and non-state secular actors play in the immediate and longer term aftermath of violence (the restoration of order, reconstruction, prevention of further violence etc)?

### 3 The roles of religious organizations in development and their implications for development partners

- 3.1 What roles do religious organizations play in development? What historical, religious and political factors explain the patterns and trajectories of the social roles of religions?
- 3.2 What is the scale and scope of development activities (such as service provision, community development, advocacy) by religious and faith-based organizations, compared to the state and other types of non-state organizations?
- 3.3 Do religious and faith-based organizations make distinctive contributions to development and service provision? How and why, with respect to:
  - inputs (the choice of activities, design of programmes, source of funding)
  - ways of operating (e.g. recruitment of staff, volunteers, beneficiaries; use of religious teaching, symbols and practices)
  - outcomes (results)
  - impact (contribution to development objectives such as poverty reduction, gender equality).
- 3.4 Does religion influence the characteristics and operations of non-religious organizations engaged in development and service provision? How and why?
- 3.5 What types of links do religious service providers have with government (and each other) (e.g. sub-contracting, regulation, allocation of funds, partnership)? How and why do these influence the services delivered? How have they changed, with what outcomes?
- 3.6 What are the implications of the characteristics and contributions of religious organizations for development partners, including various levels of government, official development partners and other external organizations such as international FBOs/religious organizations?

### Methodology

Within the social sciences, views differ on the most appropriate methodology for identifying and analyzing people's views and beliefs. They may broadly be categorized into two.

- **Quantitative approaches** in which responses are sought to structured questions. Examples of a number of sources of quantitative data on people's views and beliefs are identified and some of their strengths and weaknesses assessed.
- **Qualitative approaches** that permit and encourage respondents to put their answers in their own words. Qualitative approaches draw on the ethnographic methods used in anthropology. Because ethnographic studies are time intensive, they may not be feasible in many contemporary development

contexts. Less resource intensive versions are being developed and can be used to tackle some of the questions outlined above, for example, to ascertain how people understand their religion and how it informs their ideas about development concepts and approaches. Data collection instruments include informal conversation, semi-structured interviews, group interviews (focus group discussions), observation and documentary review. Researchers' field notes and the discourse (oral or written) are analyzed. These methods provide thick description, are based on respondents expressing their personal views and interpretations of phenomena, and enable both respondents and researchers to direct the enquiry to follow up unforeseen topics. The research subjects may or may not participate in the research design, data collection and analysis.

- **Mixed methods:** rather than quantitative and qualitative methods being seen as alternatives, some researchers seek to realize the advantages and address some of the weaknesses of both by using a combination. This approach is exemplified by a methodology developed to study the links between religion, wellbeing and development
- **Organizational studies:** In addition to personal lived religion, the study of religion and society involves analyzing the characteristics, strategies and actions of organizations. As suggested in the questions above, this first implies a need to 'map' an organizational field, to provide information on the number of organizations of relevant types and the scale and scope of their operations. Because government data collection and record-keeping is far from comprehensive, systematic information of this sort is rare or non-existent in most developing countries. A picture can be gradually assembled by starting with one or more small geographical areas.

To assess the characteristics, contributions and possible distinctiveness of religious organizations involved in welfare, development and advocacy, detailed studies of one or more organizations are also needed. One possible tool in the identification of criteria for selection of organizations for study can be a typology. The suggested research questions set out in the appendix are suitable for a comparative study of a number of organizations.

If the aim of a study is to identify whether religious organizations are distinctive, then comparisons with non-religious organizations are essential. However, especially where most people are religiously active, categorizing organizations as religious or secular is difficult and may not be appropriate. Instead, it may be preferable to identify a sample of organizations involved in similar activities and to assess

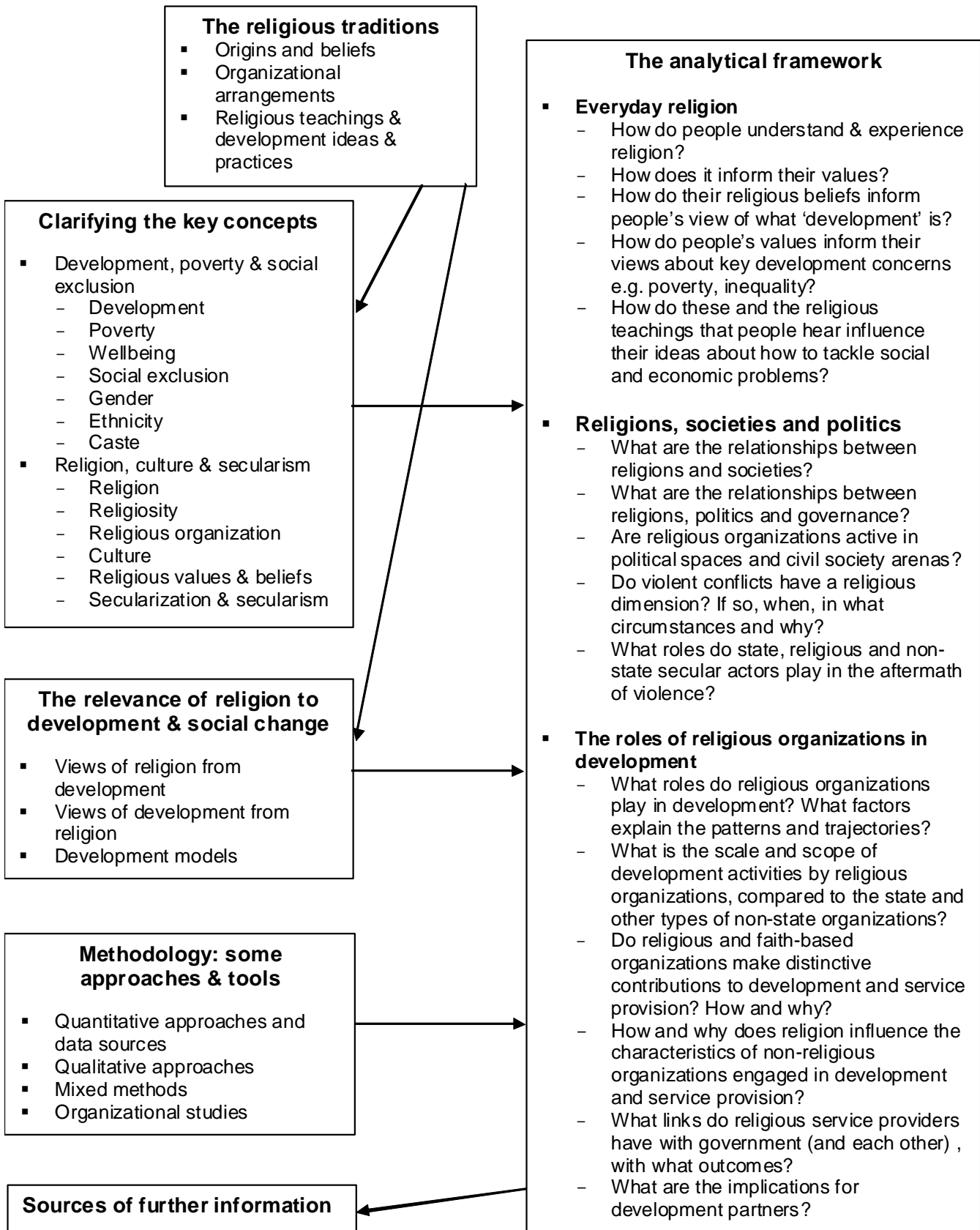
- how religion is manifest in their (and their staff and volunteers') aims, choice of activities and ways of working, and
- the outcomes of their work.

- If the aim is to compare organizations from different religious traditions, it may make sense to focus on a common activity (e.g. education) to identify similarities and differences between them, including whether and why they achieve outcomes relevant to wider development objectives e.g. increasing gender equality, reaching the poor.
- A case study of a single organization can also be informative for the organization itself or for a potential development partner or funder.

## **Further sources of information**

The guide to analysis presented here has drawn on various outputs from the Religions and Development Research Programme and other sources. Full details are provided in body of the main report or its final section, together with website links where available.

**Figure 1: A guide to analyzing the relationships between religion and development**





# 1 Introduction

In mainstream development thinking, policy and practice, religion has generally been neglected, despite its pervasiveness and importance. Of course, 'religion' and 'development' are not separate spheres of life – almost everywhere religion is an important facet of people's identities and lives and is influential in social relationships, social organizations and politics, while development also affects many aspects of people's wellbeing, the relationships between social groups, and the evolution and characteristics of social and political organization. 'Religion' and 'development' are intertwined and each influences the other. The links between them are complex:

- religious ideas, practices and organizations are affected by the political, social and economic changes that constitute and accompany development (and globalization), and
- religion is an important social institution that affects the contexts in which development actors seek to achieve greater prosperity and wellbeing.

This guide is written from the perspective of development, and so it is primarily concerned with the latter – ***how can the presence, nature and activities of religious people and organizations best be understood and taken into account in the course of development activities?***

It treats religion as a common but extremely varied social phenomenon and religious organizations as important forms of social organization. However, it does not ***assume*** in advance that

- religion is a *defining* characteristic of societies or individuals or a *central* source of values or identity, let alone *the primary* characteristic or source.
- religion is either an *obstacle* to development or a *solution* to development problems
- religious values and organizations should be prioritized over (or even included alongside) other sources of authority, values, laws and practical assistance such as the state, international human rights, state law and secular state or non-state actors.

All these are matters for empirical investigation and public debate.

Existing guides to analysis, for example of political economy, gender and social exclusion, power or change, refer to religion in passing, but give little guidance as to how it might be incorporated in the analysis. Even when those grappling with issues of politics, exclusion and power recognize that their analyses need to take religion seriously, they lack the understanding and tools to incorporate religion into their analysis, in preparation for advocacy or action. This guide provides a framework for analyzing the links between religion and development that can be used by itself or in conjunction with existing tools.

## 1.1 Potential users

This guide is intended for

- **Development agencies** interested in understanding the country contexts in which they work, to inform their analyses of political dynamics, their understanding of the drivers of social conservatism or change, and their choice of partner organizations.
- **Donors** interested in identifying the most appropriate organizations with which to work to improve wellbeing, address social exclusion and inequality, and achieve human development objectives.
- **Civil society groups and non-governmental organizations (NGOs)** seeking to identify the potential and pitfalls of working with different sorts of organizations (including religious organizations) in advocacy, welfare and development work.
- **Religious bodies (including faith-based organizations – FBOs)** seeking to improve their understanding of contemporary development thinking and practice, assess whether it is compatible with their own motivations and ways of operating, identify whether (in principle and practice) their own approaches are appropriate and distinctive, and explore the possibilities for new partnerships.
- **Researchers** interested in producing new knowledge to assist development actors improve their understanding of the contexts in which they work and the outcomes of their activities.

As with any other institutions that structure authority and social relations within a society, all agencies that seek to take religion seriously and engage with religious actors should also be aware of the possible dangers of

- privileging religion and religious organizations over others and giving them special treatment
- implicitly or explicitly endorsing religious values and norms
- using religion instrumentally to secure development objectives.

## 1.2 What is a guide to analyzing the relationships between religion and development?

An analytical framework

- identifies and clarifies the key concepts and factors that need to be considered in any attempt to understand the social world, drawing on social theory, personal experience and existing empirical research.
- identifies key questions that need to be addressed to understand the relevant factors in a particular setting and to assess how they are related to each other – how one or more factors might be linked to and/or explain others.
- suggests how the characteristics of potentially important factors and the interactions between them might be studied.

It provides a foundation for data gathering and empirical analysis, an indication of the characteristics that various phenomena might have and preliminary ideas about the nature of the relationships between them. It is not a fully fledged theoretical framework, which would explain *why* the relationships between religion and development have the characteristics and effects observed and provide one or more propositions (or hypotheses) for further testing. The individual research projects referred to in Section 4 did attempt to explain their findings, but further work is needed to develop such a wider theory.

For some social phenomena or issues, the relevant factors and the links between may be obvious, clearly defined and easy to document or quantify. For example, vehicle ownership rates are easily measurable and much research has demonstrated that they are primarily linked to income levels – thus increases in disposable income tend to result in increased vehicle ownership (the direction of cause and effect is clear). However, other factors may also be relevant, for example, patterns of settlement and land use, the availability and cost of loans, the availability and price of vehicles (affected by the location and volume of production and government taxation) and the availability and cost of both fuel and public transport, as well as the more amorphous factor of consumers' aspirations.

Other social phenomena are complex and dynamic. They cannot be easily conceptualized, let alone measured, have many facets and are subject to a variety of influences. They cannot be thought of as a single ‘factor’, and they both influence and are influenced by other phenomena in far from straightforward or easily discernible ways. ‘Religion’ and ‘development’ are both such complex and dynamic social phenomena, so defining each of them, identifying their characteristics and teasing out the relationships between them is a much less exact process than understanding trends in vehicle ownership.

Nevertheless, it is possible to clarify the concepts and identify possible links between them to enable observers to

- improve their understanding
- evaluate alternative strategies and actions
- engage in dialogue informed by knowledge rather than prejudice and ignorance, and
- forge partnerships based on mutual respect and understanding.

The analysis suggested in this guide may be useful

- ***To improve understanding of a geographical area (country, region, locality)***, for example, during the preparation of a donor country plan, or the design of a programme intended to improve maternal health. Analyzing the role of religion in a society can significantly add to understanding of its political economy, patterns of social exclusion and processes of change – it may or may not influence priority setting and policy goals, but is likely to influence the design of programmes and processes of implementation.
- ***In devising policy and interventions for particular sectors or issues*** in which religious beliefs are particularly salient or religious organizations play important roles that may or may not be compatible with development objectives. The health and education sectors immediately come to mind, in which religious values and beliefs influence people’s attitudes towards family and gender relationships, sexual and health behaviour, and the socialization of children, while religious organizations are often important (if controversial) service providers. An understanding of moral values (for which religion is one source) and how they are or are not translated into behaviour is also relevant to aspects of governance, such as corruption.
- ***In developing strategies to tackle social exclusion and disadvantage*** through advocacy, forging broad alliances for reform, or devising interventions to address a particular issue. Religion may be

implicated in exclusion associated with gender, caste or religious minority status. Religious bodies may play a role in promoting or blocking change – analysis can identify the positive and negative roles religious organizations play and identify the potential for (and barriers to) working with them in efforts to tackle exclusion and discrimination.

Many development agencies have in recent years developed guides to political economy, gender and social exclusion or power. These have some common features but are also adapted in the light of experience and to suit the needs of particular agencies. The approaches to political economy and gender and social exclusion analysis currently used by DFID are summarized in Boxes 1 and 2, with some comments on how religion is treated. These guides are designed for use primarily by international development agencies. Civil society organizations are more concerned with social exclusion and thus with politics and citizen action ‘from the bottom up’ – power analysis seeks to enable them to understand how change happens and to develop strategies to achieve desired social and political changes. It is summarized in Box 3.

For relevant contexts, sectors and problems, broader political economy analysis (Box 1) can be strengthened by analyzing

- the relationships between religion, politics and governance
- the characteristics and roles of religious organizations.

While the guide to gender and social exclusion analysis (Box 2) recognizes that religion and religious organizations may be relevant, it can be strengthened by integrating religion systematically into the proposed analytical framework. To do so, guidance on how to understand religion and incorporate it in the analysis is needed.

Initially, religion was not a central feature of frameworks for analyzing power and change (Box 3). However, local teams piloting the analysis in countries where Oxfam works stressed that “The shifting tides of religious belief ... are one of the most fundamental drivers of social and political change.” As a result, the organization’s interest in incorporating religion into the analysis increased.

This guide may, therefore, be used by itself or in conjunction with other analyses and guides.

## Box 1: Political economy analysis

Building on earlier attempts to provide guides to identifying ‘drivers of change’ and understanding the ‘politics of development’, political economy analysis is concerned with

...the interaction of political and economic processes in a society: the distribution of power and wealth between different groups and individuals, and the processes that create, sustain and transform these relationships over time (DFID, 2009a, p 4).

It seeks to explain what drives political behaviour and how this shapes decisions and determines winners and losers, and to identify the implications for policy, by understanding the interests and incentives facing different groups and how these influence policy, the role of formal and informal institutions in shaping interaction, and “the impact of values and ideas, including political ideologies, religion and cultural beliefs, on political behaviour and public policy” (p 4).

It can contribute to assessing the feasibility of state-building, policy reform and institutional change, suggesting what contribution donors can make, and assessing the risks involved. It is therefore seen as relevant to

- typical donor tasks (such as formulating country plans, choosing aid modalities and partners, designing programmes and projects, and informing dialogue and engagement with partners) and
- the issues with which donors are concerned (state-building, peace-building, civil service reform, growth, service delivery).

At country level, the analysis focuses on structural features, institutions and agents and the relationships between them, how political decisions are made and what influences them. At sectoral level, the preparation of a sector stakeholder map is suggested and a series of questions, some specific to particular sectors.

Religious organizations are mentioned as part of ‘mass associations and social movements’ in a sector stakeholder map and it is suggested that a question on values and ideologies be included in sector analysis. In addition, the importance of seeking the views of a representative sample (“interviewees from different regions and ethnic/religious/social backgrounds”) in any qualitative research with key stakeholders is stressed. However, no further guidance is given on how analysis of religious organizations and values might be undertaken.

Various roles for civil society organizations (CSOs) are mentioned in passing, as potential members of change coalitions, a ‘sector’ with which donors can engage, agents, sources of pressure and influence, stakeholders in certain sectors, providers of information for the analysis, and potentially involved in or affected by its use. However, beyond distinguishing between international and national NGOs and ‘mass associations and social movements’, no guidance is given on how CSOs might usefully be differentiated.

## Box 2: Gender and social exclusion analysis

The aim of gender and social exclusion analysis is to identify

- who is excluded
- the processes which cause and perpetuate gender inequality, discrimination and social exclusion
- the impacts of inequality and exclusion on poverty reduction and other development objectives, including the empowerment of disadvantaged groups (DFID, 2009b).

The analysis involves consideration of the formal and informal processes and mechanisms that underlie and cause gender inequality and social exclusion, as well as reinforce and perpetuate it. It examines the three main spheres of people's lives in which political, economic, social and institutional factors interact to prolong or deepen poverty: society, the market and the state.

The analytical framework is set out as a number of questions under a series of sub-headings, with the user referred to other sources for methods and tools for analysis.

- **Society:** the analysis is concerned with the social norms, cultural practices and informal institutions that lead to some groups being discriminated against and which prevent particular groups from moving out of poverty. Questions, some of which refer to religion, are listed under six sub-headings,:
  - Vulnerability
  - Intra-household relations
  - Social and cultural practices (including "religious and other cultural practices", p 12)
  - Traditional local, religious and community governance:
    - What is the role of traditional governance systems such as chiefs and religious leaders?
      - Do they reinforce or challenge social norms and to what extent do they support and implement relevant formal laws and policies?
      - What types of community organizations exist and what is their role in reinforcing or challenging gender inequality and social exclusion?
      - To what extent can and do women and members of different excluded groups hold positions of authority or influence within traditional and religious institutions?
  - Civil society and the media, including how extensive participation by women and different social groups is in voluntary associations, religious groups etc.
  - Social cohesion, violence and conflict
- **Market:** the analysis focuses on processes of discrimination that lead to exclusion from market opportunities related to income and employment, assets and overall economic growth
- **State:** it is suggested that the analysis should identify governance issues and the formal barriers that result in exclusion from decision-making, services, assets and opportunities: citizenship, voice and accountability, the formal political system, policy, public services and the legal framework.

It is recommended that the analysis should include consideration of past and potential future trends and risks, to identify the implications of inequality and exclusion for policies intended to reduce poverty, achieve economic growth and ensure political stability. In addition, the policy environment should be surveyed in order to identify potential entry points, along with past and planned responses by government, CSOs, the international community and private sector actors. The analysis, it is suggested, can be used in identifying issues and suggesting choices during the preparation of donor country plans and programmes.



### Box 3: Analyzing power and change

Various research programmes and NGOs are developing tools to understand the ways in which unequal power relations cause poverty and suffering. Power analysis also provides guidance on how those concerned with social justice can use it to

- develop advocacy geared to improving the lives and participation of marginalized people
- forge broad alliances for reform across society.

It is, therefore, concerned with understanding how change happens (Gaventa, 2006; [www.powercube.net/analyse-power](http://www.powercube.net/analyse-power)).

A power analysis identifies and explores the multiple power dimensions that affect a given situation, sometimes portrayed diagrammatically as a matrix or cube. It is based on recognition that power

- Takes different **forms**: visible (observable decision making), hidden (setting the political agenda) and invisible (shaping meaning and what is acceptable)
- Is acted out in different **spaces**: closed, invited and created or claimed
- Occurs at different **levels**: household, local, national and global

Not only do all these dimensions need to be analyzed, but it also needs to be recognized that power can be

- **power over**: the power of the strong over the weak, including the power to exclude others
- **power to**: the capability to decide actions and carry them out
- **power with**: collective power, through organization, solidarity and joint action
- **power within**: personal self-confidence, often linked to culture, religion or other aspects of identity, which influences the thoughts and actions that appear legitimate or acceptable.

Power analysis is set out as a series of questions, related to

- who is exercising power or seeking to be empowered?
- with whose support?
- in what contexts, levels and spaces?
- with respect to which sectors and issues?
- using what strategies, methods and models to campaign and build alliances?

To understand **how change happens**, Oxfam suggests, attention needs to be given to

- **Agents**: organizations and individuals actively involved in promoting or blocking change
- **Institutions**: the organizations and rules (both formal and informal) that establish the 'rules of the game' governing the behaviour of agents
- **Context**: the environment within which change occurs, including demographic change, globalization, environmental resources and change, technological change
- **Events**: one-off events that trigger wider change

Of these, the first two, which overlap, are regarded as central. The **components** of change interact to produce dynamic **pathways of change**, which may be marked by change moments, provide windows of opportunity, or coalesce round inspirational ideas, individuals or organizations. Those seeking to design strategies to influence decision-makers need to understand which actors might be champions or blockers, who they might form alliances with, and how the powerful will react to pre-empt change (Green, 2008 [http://www.oxfam.org.uk/resources/downloads/FP2P/FP2P\\_BK\\_Annex.pdf](http://www.oxfam.org.uk/resources/downloads/FP2P/FP2P_BK_Annex.pdf)).



### 1.3 Purpose and content of the guide

This paper *aims* to provide guidance on how to better understand the links between religion and development. The primary purpose of such analysis is to inform development policy and practice.

However, it can also be useful in improving mutual understanding between religious bodies and their adherents, and between religious and development actors, perhaps through translation into educational and training materials.

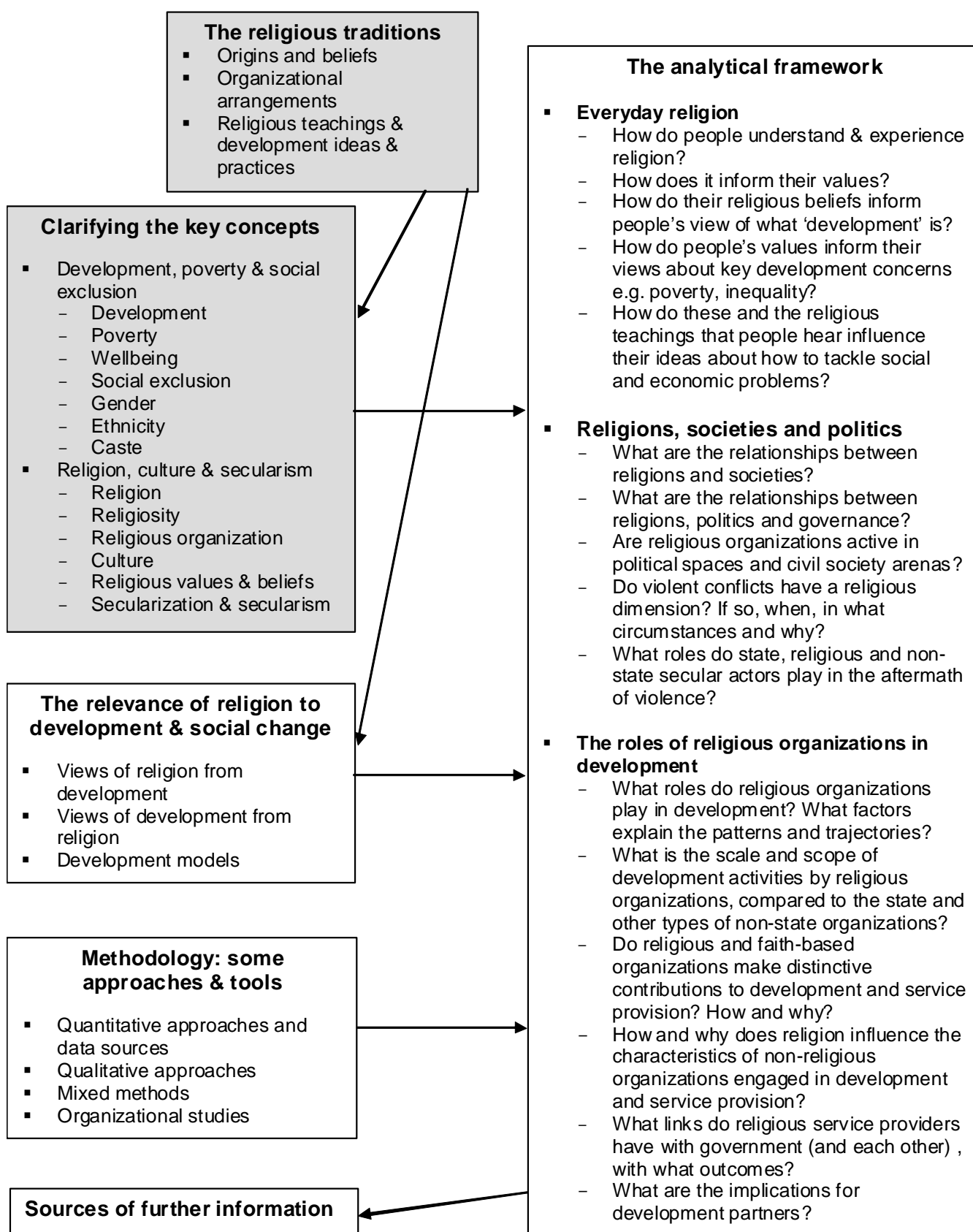
The guide will

- identify and clarify some of the key concepts, including summarizing similarities and differences between some of the main religious traditions
- explore ideas about the relevance of religion to development and social change
- present a framework that identifies the broad levels of analysis needed when seeking to understand a particular context, suggesting questions that should be asked on each issue, with illustrations from research undertaken by the Religions and Development programme
- identify some possible approaches and tools for use in the analysis, and
- identify sources of further information.

These elements are shown diagrammatically in Figure 1.

- In Section 2, some of the key concepts are identified and clarified, to provide analysts with basic working definitions, so that those engaged in dialogue share a common lexicon or can flag up differences in their understanding of terms and concepts for further discussion. The Section is divided into two. The first deals with concepts relevant to development, poverty and social exclusion, and the second with religion, culture and secularism. As the understanding of many concepts varies widely between the religions, brief sketches of relevant aspects of some of the main religious traditions will also be provided, including their origins, main beliefs and organizational arrangements.
- Some of the ways in which religion is relevant to development and social change are discussed in Section 3.
- The analytical framework or guide is itself outlined in Section 4, with illustrations from research undertaken as part of the Religions and Development Research Programme.
- In Section 5, some ways in which the relationships between religion and development can be studied are suggested.
- Finally, references and some sources of further information are identified.

## Figure 1: A guide to analyzing the relationships between religion and development



## 2 Clarifying the concepts

As noted above, the primary purpose of this guide is to enable those engaged in development policy and practice to develop a better understanding of religion and religious organizations. However, it is also recognized that, while many religious actors have similar concerns to secular development actors, dialogue can be difficult, sometimes because priorities and values differ but also because understanding by one of the other is weak.

Religious and other organizations using this guide may not be aware of about contemporary development thinking, so the section starts with a consideration of some key development concepts, including some of the dimensions of social difference that affect wellbeing, poverty and social exclusion, including gender. Development agencies often have little understanding of 'religion' and associated concepts, so these are clarified in Section 2.2. In the next section, ideas about the links between religion, development and social change are briefly discussed.

### 2.1 Development, poverty and social exclusion

Ideas about '**development**' have been evolving for nearly two hundred years and are highly contested between scholars from different disciplines and schools of thought, policy makers and activists. While it is neither possible nor necessary to provide an account of how development thinking has evolved here (but see Nkurunziza, 2007), it is vital for those new to the field to appreciate how ideas about what constitutes development and how to achieve it have changed both in the light of experience and in response to challenges to dominant ideas and sets of policies.

Consciousness of the idea of development is closely associated with the emergence of capitalism. It emerged first in the work of the 19<sup>th</sup> century classical political economy theorists, such as Ricardo, Smith, Marx and Engels, who sought to understand the stages of development of the capitalist system, although development itself was more commonly referred to as 'progress' (Nkurunziza, 2007). Classical political economy was displaced by neo-classical economics, which divorced economic analysis from its socio-political context and conceived development as economic growth, to be achieved through market forces and the expansion of knowledge and technology. Nevertheless, following the world depression of the 1920s and 1930s, neo-classical economics' faith in the market had to be tempered and there was increased agreement in the industrialized countries that state intervention is necessary, paving the way for state-led approaches to development in the 1940s.

Alongside neo-classical theorists, Marxists developed the theory of imperialism, which regards imperialism as a necessary stage in the development of capitalism. Colonialism was regarded as simply the political means by which the safety and profitability of exported capital was secured. Supporters held that the export of capital and colonialism would bring about industrialization in colonized countries. However, by the 1940s, it was clear that the anticipated economic transformation was not occurring, and they had to concede that removing imperialism through political independence was key to realizing development.

Concern over the continued underdevelopment of Latin American countries, which had emerged from colonial rule much earlier, and the likely economic trajectories of countries gaining independence between the late 1940s and the 1960s fuelled academic and policy interest in how to ensure that political independence was accompanied by economic transformation and increased prosperity. Primacy was given to economic growth, measured in terms of the total value of economic activity (GDP and GNP). The dominant model used had been formulated by economists interested in ensuring sustained economic growth, which was considered to be determined by the capacity to save and invest. Economic growth, it was assumed, would trickle down, eventually resulting in increased incomes for all.

According to this theory, the main constraint on economic growth in developing countries was the relatively low level of investment – a savings gap that could be met by foreign direct investment, supplemented by government financial assistance. Borne out by the apparent success of the Marshall Plan in rebuilding the economies of war torn Europe, this diagnosis provided a justification for the emergence of a structure of bilateral and multilateral financial institutions – the ‘aid business’.

However, the Keynesian model was designed to maintain economic growth and full employment rather than launch economic growth in the first place, the problem faced by many developing countries. Economists concerned with enabling ex-colonial countries to escape the trap of dependence on natural resources differed on how economic development could be stimulated, although most believed in a ‘big push’ approach to breaking the vicious cycle of low production, a small domestic market, sparse capital and limited savings. Strongly influenced by ideas associated with the European enlightenment, it was assumed that all countries would follow a similar path of economic and social

transformation. When favoured economic policies failed to deliver economic and employment growth, economists resorted to the work of others to understand why.

Curiosity about the countries to which increased numbers of traders, missionaries and colonial administrators travelled in the 19<sup>th</sup> century, and the desire of colonial governments to understand the countries they were attempting to govern led to the emergence of the discipline of anthropology alongside sociology. A distinction between tradition and modernity had first been used in attempts to explain the transformation of European and North American countries from pre-capitalist societies into industrial capitalist economies. To most theorists, the trajectory followed by the West in its transition from 'tradition' to 'modernity' provided a template that would be followed by all other countries. It was believed that all societies would eventually achieve the industrialization, urbanization, secularization and rationality already experienced in much of Europe and North America – modernization was regarded as inevitable and the role of policy was to accelerate the process.

Attempts to transform the economic structure of developing countries led to a realization that economic behaviour and institutions are embedded in social and cultural institutions (norms, rules of the game). From expecting that an inevitable outcome of economic change would be social transformation, a jump was made to assume that reorganization of social and cultural institutions would *facilitate* economic growth. Values and social relations were considered to be key institutions, and societies were categorized as 'traditional' or 'modern' depending on whether the predominant social values, orientations and relationships were those considered typical of 'underdeveloped' or 'developed' countries (see also Section 2.2.5). Modernization, it was assumed, would be marked by transitions from

- a subsistence agrarian to an industrialized economy
- a subject to a participatory political system
- a social system in which an individual's position is determined by birth to one in which achievement is rewarded
- a social structure based on nuclear rather than extended families and
- a religious to a secular ideology.

In this view, economic transformation can be facilitated by ensuring a transition from a society dominated by traditional values to one characterized by modern orientations for action (not least individualism and the pursuit of wealth).

In the 1950s and 1960s, spearheaded by the US, the West assumed the 'moral responsibility' for spreading economic, political and social modernity to the countries of the South and modernization became the predominant discourse in the global development agenda. Modernization theory emerged out of the uneasy relationship between economics on the one hand and anthropology and sociology on the other. In this discourse, economic growth continued to be, at the very least, a pre-condition for development and at times synonymous with it. Most policies were geared towards promoting economic growth or eliminating perceived impediments to it, including traditional customs and values. The strategies for doing so included training entrepreneurial and administrative elites, expanding education, encouraging the development of mass media and replacing patterns of authority based on traditional loyalties with representative political systems and state laws.

The invisibility and neglect of religion in mainstream development theory and practice can be attributed to both the secularization of the state and society that was supposedly occurring, especially in Europe, and to modernization theory, which was associated with the view that 'religion' is associated with 'tradition' and therefore would (and should) disappear from the public sphere and also become less significant in the private sphere of people's families and everyday lives.

Some countries did experience economic growth. However, by the late 1960s, it was clear that the gap between rich and poor countries was widening, many countries had failed to achieve economic 'take off', and living conditions in much of the South were worsening. Critics multiplied, challenging the economic and social theories on which the model was based, identifying shortcomings of the dominant policy interventions and drawing attention to the failure to deliver widespread improvements in standards of living. In the 1970s, radical critics (including some associated with different faith traditions) blamed unequal global trade relationships and capitalism itself, suggesting solutions based on alternative principles such as self-reliance, altruism and empowerment of the powerless.

More commonly, many (including the World Bank) accepted that modifications to an approach that focused primarily on economic growth were necessary: not only was failure to invest in sectors such

as education, health and water hindering economic growth, 'trickle down' was not reducing poverty as anticipated and malnutrition, disease, illiteracy, unemployment and inequality were not being eliminated. Instead, it was argued, basic needs cannot be satisfied and poverty reduced without specific policy interventions and earmarked investment.

By the 1980s, however, the debate in development studies and policy had shifted from disagreement over the specific role the state should play in the development process to whether it should play a role at all. This reflected both government shortcomings in countries in the South and the intellectual dominance of neo-liberalism, an economic and political ideology that underpinned the pro-market ideology and economic policies of the Reagan government in the US and the Thatcher government in the UK, amongst others, and appeared vindicated by the collapse of the Soviet Union at the end of the 1980s.

Applied to developing countries, neo-liberal political and economic prescriptions became known as the Washington Consensus, because of the unity between and dominance by Washington-based opinion leaders (in the US government, the IMF and the World Bank). Diagnoses of development problems focused on internal failures of governance and policy rather than external economic or political relations. As a result, the development principles espoused coalesced around democratization and the theory and practice of 'structural adjustment': downsizing the state and reducing its role, privatization of state-owned enterprises, increased reliance on market forces and rapid economic liberalization.

Forced on aid-dependent countries hit by oil price increases, the reforms did have some positive results. However, full implementation of the standard and complex package of policies was not achieved anywhere, and the results fell far short of what its advocates had anticipated. In addition, many groups suffered cuts in real income due to the pressure to increase prices paid to farmers for their products, cuts in food and other subsidies, and reduced government spending on sectors such as education and health.

Political protests that undermined newly established democratic governments; challenges by CSOs dismayed at developing countries' loss of autonomy, increases in poverty and deteriorating infrastructure and services; and criticisms of neo-liberal theory and policy mounted. The vital role of the state in creating the conditions on which markets depend to operate and the need to directly tackle



poverty (and to some extent inequality) were accepted. By the end of the 1990s, the international community had embarked on efforts to tackle poverty and deprivation, initially through support for Poverty Reduction Strategy Programmes. In 2000 these intentions were expressed in a commitment to achieve the Millenium Development Goals by 2015.

These revised priorities drew on improved understanding of the nature and extent of poverty, pressure from developing countries for greater policy autonomy and recognition that the delivery of aid was exacerbating rather than solving governments' financial management problems. They retain many aspects of neo-liberal politics and economics, but fuse them with ideas about 'human development.'

The concept of human development reflects the ideas on which the UNDP's annual *Human Development Report*, founded by a Pakistani scholar and practitioner, Mahbub ul Haq, is based. To quote ul Haq:

People often value achievements that do not show up at all, or not immediately, in income or growth figures: greater access to knowledge, better nutrition and health services, more secure livelihoods, security against crime and physical violence, satisfying leisure hours, political and cultural freedoms and a sense of participation in community activities. The objective of development is to create an enabling environment for people to enjoy long, healthy and creative lives (<http://hdr.undp.org> )

In this view of development, economic growth is one, but certainly not the only, means of increasing the opportunities for people to live the lives they value – it may be necessary, but it is certainly not sufficient. For wellbeing to be improved, as stressed by Amartya Sen, people need to be able to make choices and to exercise control over their lives. For this, their rights need to be safeguarded and their capabilities increased, suggesting priority concerns for development policies and programmes. Conceptions of wellbeing thus need to reflect not just ideas about the material resources people control and adequate standards of living defined in quantitative terms (often by outsiders such as government departments or aid agencies) but also people's own perceptions of their quality of life (see below).



Of course, even this improved concept of development is contested. Some critics dislike its focus on rights and freedom to choose, seeing these as inextricably linked with post-enlightenment individualism and liberalism. There is continued disagreement over how to achieve improvements to human development and wellbeing. In addition, more radical critics stress that the very concept of development is entangled with ideas of modernity – implying cultural Westernization, the extension of Western political and economic power, and exploitation of natural resources and indigenous peoples alike. Some critics are associated with earlier challenges to dominant models of development, for example, advocates of community development and empowerment, or the Roman Catholic Church's 'option for the poor'. Post-development and post-colonial writers challenge the dominance of Euro-America, Western control of knowledge and terms such as 'modernity' and 'progress'. They urge that local diversity is recognized and the lost voices of the colonized recovered. When engaged in practice, such critics may be part of social movements that challenge dominant approaches to development and oppression (such as the environmental or women's movements).

Although post-development thinking insists on the importance of culture and local diversity, modernization theory continues to influence mainstream development thinking, including the view that religion is a hindrance to modernization and progress. Nevertheless, more recently, new challenges to conventional development models have been posed by Muslims dismayed by the lack of economic development in many post-colonial Muslim countries. The quest to develop theory and practice in Islamic economics has been particularly noteworthy in this respect (see for example, Zaman, 2008).

While many of the criticisms of the dominant models of development are valid, some critics set up 'straw men', constructing a notion of the conventional approach that fails to recognize either the great diversity within mainstream development thinking and practice or the existence of other challengers and alternative approaches.

Evolving ideas about and approaches to development have implications for conceptions of **poverty**. Conventionally, especially in economics, it is understood in terms of the income necessary to buy a basket of basic goods (food, services, shelter etc). Poverty is defined as a shortfall in income or consumption from the poverty line (for individuals or households), defined in absolute or relative terms. However, in addition to the methodological and practical problems encountered when applying this concept, it has widely acknowledged conceptual shortcomings, especially its inability to capture many

dimensions of poverty and its failure to specify the transmission mechanisms linking poverty, growth and inequality (see, for example, Stewart et al, 2007; Ludi and Bird, 2008).

The capabilities approach, pioneered by Amartya Sen, is based on the contention that poverty is determined not by a lack of money income but by the inability of individuals to realize their full potential or live the lives they value, characterized above all by knowledge, good nourishment and good health. People lack the capabilities needed for the lives they value because of their lack of command over resources, including their inability to access goods and services. This multi-faceted concept of wellbeing cannot be realized solely by earning a sufficient income. Instead it links people's inability to claim their entitlements as citizens to unequal power relations (Sen, 2000; see also Deneulin and Shahani, 2009; Saith, 2007a).<sup>1</sup> Although Sen did not provide a list of minimal essential capabilities, others have attempted to do so.

Both income and capability approaches to poverty tend to concentrate on inputs (e.g. income, services) rather than outcomes (e.g. welfare), use indicators defined by outsiders, and to be individualistic. Attempts to tackle these shortcomings include

- improved methods for defining and studying poverty and welfare
- identifying how the poor themselves see poverty and wellbeing and
- identifying the processes by which people are marginalized and impoverished.

**Wellbeing** is experienced when people have what they need for life to be good (White, 2009, 2010; see also Gough and McGregor, 2007). It has

...three key dimensions: the material, the relational, and the subjective. The material comprises assets, welfare, and standards of living. For practical analysis, the relational is divided into two spheres: the social: social relations and access to public goods; and the human: capabilities, attitudes to life, and personal relationships. The subjective also has two aspects: on the one hand people's perceptions of their (material, social, and human) positions, and on the other hand cultural values, ideologies, and beliefs (White, 2010, p 161).

She suggests that "a similar pattern can be found in religious discourse, such as the Christian formulation of being right with God, enjoying material sufficiency, and being right with one's neighbour" (p 162).

The material refers to the ‘stuff’ of wellbeing, such as food, shelter and the physical environment. It concerns levels of consumption, livelihoods and wealth, and has both subjective and objective dimensions.

The social dimension of wellbeing comprises ... social networks, along with access to public goods – policing and the law, social and welfare services, the quality of the physical environment, and access to amenities. It also concerns social divisions and inequalities, and the forms of entitlement and domination codified in identities by class, caste, gender, religion, race, ethnicity, age, disability, or ritual responsibility. It considers whether people are subject to violence or other forms of social conflict and (in)security; and the political arena: the mechanisms and scope that people have for collective action on matters that concern them. Subjective dimensions of the social concern how satisfied people are with their access to services, amenities, and the way they are treated, their views on the physical environment, and how they perceive the social setting – as safe or unsafe, characterised by justice or discrimination (White, 2010, p 163-4).

According to White, this emphasis on social or relational dimensions avoids the neglect of the social and cultural that characterizes much writing on wellbeing, arising from its focus on individuals. Thus in her view, personal values and goals should be “located within broader normative frameworks and ideologies, understandings of the sacred, what the moral order is and should be, and what it means to live a meaningful life. Sometimes these take an explicit religious or political form; at other times they are part of the collective unconscious” (p 164). In addition, understandings and experiences of wellbeing are dynamic: they change over time and relate in complicated ways to geographical settings.<sup>2</sup>

The concept of **social exclusion** was originally coined to explain the deprivation experienced by residents of inner city neighbourhoods in Northern countries. It originally applied to labour markets, and was extended because it was realized that unemployment tends to be compounded by other types of deprivation. It is used to describe a process through which individuals or groups are, for reasons beyond their control, excluded from full participation in the activities of the society in which they live. In addition, many are included, but in disadvantageous ways (adverse incorporation). People and groups with particular identities or social characteristics (e.g. women, immigrants, ethnic minorities, young people) are often particularly disadvantaged.

Exclusion/adverse incorporation are seen as key determining factors of various facets of poverty, including inadequate incomes. They arise from the voicelessness and powerlessness of individuals and households, which limit their ability to organize themselves, make demands, claim entitlements or receive support for their own initiatives (Ludi and Bird, 2007; Saith, 2007b). Exclusion and adverse incorporation are processes rather than states – they are reproduced and reinforced at community and national levels through, for example, discrimination, political under-representation or regressive policies, and justified by particular representations of history and labelling. Disadvantaged groups may employ political tactics to increase their influence, organize themselves to challenge policies and practices, or associate themselves with different or new identities to increase their dignity and self-confidence.

Originally developed to understand and explain the position of disadvantaged minorities, the concept is now widely used in developing countries where the majority (or a large minority) have incomes below the poverty line. The social characteristics with which social exclusion and adverse incorporation are associated are often similar to those characterizing excluded groups in Northern countries, including gender, migration status, ethnicity and age. Sometimes also, minority status is key (for example, religious minorities) and in South Asia, especially India, caste is important.

Dimensions of social difference that are associated with exclusion or adverse incorporation operate alongside, counteract or are reinforced by religious identity. The links between religion and development are complicated by other facets of people's identity and cultural heritage; indeed what appear to be links between religion and attitudes or wellbeing may actually be attributable to other factors. Thus awareness of these other dimensions of people's lives and identities is important and should be taken account of in analyses of the relationships between religion and development. Three of the most relevant are briefly reviewed here.

### **2.1.1 Gender**

Unlike sex, which denotes the biological differences between men and women, gender refers to the social construction of masculine and feminine roles and identities, which may be justified in terms of the biological differences. Failure to recognize the social roles played by women led to the adoption of development policies and programmes which ignored their needs, with often adverse effects. Initially, advocacy concentrated on ensuring that data are disaggregated by sex and that adequate attention is

paid to the needs of women in policy and practice. However, recognition that women's roles in production and reproduction and their often disadvantaged position in society are created and sustained through power relationships between women and men led to a broader conceptualization of gender relations as characterized by patriarchy. This refers to a social system in which the role of the male as the primary authority figure is central to social organization, and where fathers hold authority over women, children, and property. It implies that men are privileged and women subordinated. Gender analysis was developed as a tool for understanding gender relations and their influence on the position of both men and women, identifying how policies and projects can be gender-aware and providing pointers to assessing whether and how their outcomes are gendered. However, the focus of much gender analysis has been on the women's rather than men's identities and positions.

Religion impacts differently on women's and men's lives, given the patriarchal context in which people live. While religion influences gender relations in the wider society, patriarchy influences the expression and organization of religion. Like other forms of social organization, religious organizations are gendered in terms of their leadership, decision-making structures, staffing and membership. They often limit the roles that women can play, prevent them from assuming positions of responsibility and define them in terms of their domestic responsibilities. The exclusion of women from leadership positions in many religious traditions and organizations means that they lack the status and authority to challenge negative attitudes and practices within religious organizations themselves, families and the wider public sphere. In addition, because religious teachings are taken seriously by most people in developing countries, religious justifications for patriarchy are often particularly influential.

However, different styles of 'religious feminism' have also emerged in many of the faith traditions, which "argue for re-interpretations of religious systems that are consistent with the 'core' values of the tradition as well as various forms of feminist thinking" (Tomalin, 2007a, p 15). Thus while it is essential to be sensitive to the ways in which religious and cultural factors shape gender relations, it must be recognized both that they may be either oppressive or empowering, and that gender relations cannot be portrayed as shaped solely by religion or culture. In addition, women's roles in congregations and other religious organizations as members, volunteers and staff, may empower them through the development of skills, access to social capital and the provision of socially acceptable livelihoods and roles in the public sphere.

As well as playing important roles in people's religious and social lives, religious organizations are active in service delivery and development, so the ways in which gender influences their priorities, choice of activities, design of programmes and organizational characteristics is potentially significant: it may influence the types of services they provide, access to their programmes and the ways in which their staff and volunteers are treated.

Finally, in countries where most people are adherents to one religion or another, religion and its gendered teachings and values is influential in all social, political and economic arenas and organizations and not just ostensibly religious ones.

### **2.1.2 Ethnicity**

Ethnicity may be regarded as a cultural given, an identity that can change and be manipulated, or some combination of the two. An ethnic group can be defined as

..an ascriptive social collectivity whose members not only share such objective characteristics as group name, core territory, language, ancestral myths, culture, religion and/or political organisation, but also possess some subjective consciousness or perception of common identity or descent... developed.. under situations involving contact or interaction between two or more ethnic groups" (Suberu, 2000, p124) (*NB ascriptive means a social group into which one is born*).

Thus the term joins the subjective dimension of 'peoplehood' (the group to which people think they belong and from which they derive part of their identity) with the objective dimension of economic and social interests (identifying with a particular ethnic group to gain access to resources).

Initially associated with co-residence in a region and similarities of culture, tradition, legal and economic practices, the salience and rigidity of ethnic grouping was increased by colonial attempts to make sense of and codify social divisions. However, colonial identification of an ethnic group (or 'tribe') was not necessarily sufficient to create a sense of common identity. When an ethnic group interacts with others, the aim is usually to promote the interests of its dominant members. However, the dominant group also has to maintain the unity of the group as a whole, in which it does not always succeed, so ethnic groups are often marked by internal factions and conflicts. Nevertheless, even if members only have a limited attachment to the goals and values of the group, ethnic identity can be mobilized for political purposes. In the absence of other loyalties (e.g. class) and because politics is

often seen as a zero sum struggle for political power and economic resources, it can come to be dominated by ethnicity.

Although some associations concerned with the welfare of individual members are based on ethnicity, ethnic organizations generally seek to advance the general goals of a community 'for itself' i.e. the security, identity and wellbeing of the group as a whole. However, some groups (for example minority groups) are discriminated against and may not succeed in achieving this goal. For example, 'tribal' groups in India are recognized constitutionally as disadvantaged groups and a number of policies discriminate in their favour, such as the reservation of a proportion of political offices and government jobs for their members.

Often discrimination is justified by labelling groups as inferior (e.g. some groups are seen as physically strong, others as weak; some as hard-working and entrepreneurial, others as lazy; some as intelligent, others as slow-witted). The experience of such discrimination and struggles for recognition and equality may harden members' sense of identity, as may ethnically based political rivalry. As noted above, ethnicity is only one aspect of a person's identity, but it may be reinforced if it coincides with other aspects, such as religion. In many parts of the world, ethnic groups are associated with locally specific folk religions, but if the activities of traders and missionaries exposed indigenous people to Islam or Christianity, conversion to one or other of these religions may be associated with particular ethnic groups. When religious and ethnic group boundaries coincide, religious and political rivalry may be exacerbated.

### 2.1.3 Caste

Caste in South Asia, especially India, is based on *jati* (a birth status group) and may be seen as a 'system' in which interdependent castes have traditional occupations, ritual status, a place in the hierarchy of castes and follow a rule of endogamy (marriage to another caste member) (Srinivas, 1996). Its three central characteristics are therefore

- exclusion or separation (rules governing marriage and contact, which maintain caste distinctions)
- hierarchy (the principle of order and rank according to status) and
- interdependence (a division of labour which is closely tied to hierarchy and separation).

Caste is closely associated with the Hindu religion and its ideals of ritual 'purity', 'impurity and 'pollution', which are associated particularly with food. The ideology justifying the caste system came from Hindu scriptures and law books, and included the concepts of both *varna* (the four traditional 'classes' in society that are ranked hierarchically: Brahmins, Kshatriyas, Vaishyas and Shudras) and *jati* (birth groups or 'castes', of which there are thousands), as well as religiously ordained duties for members of different castes. Although most closely associated with Hinduism, caste is the basis for wider socio-cultural stratification in India, with Muslims, Buddhists, Christians and Sikhs also observing some aspects of caste-related behaviour.

Rules of behaviour and patterns of interaction with other birth-status groups are maintained within kinship groups. Cultural practices (modes of worship, fasts and festivals, rules governing purity and pollution, and the organization of space) are learnt and enforced through the family and household. These impart identity and commonality to members of a caste.

The caste system is associated with hierarchy. Although there are a variety of legends or origin tales which serve to justify the position of one caste in relation to others, the one which dominates is that which Brahmins favour, since it places them at the top and Dalits (formerly called Untouchables) at the bottom, outside the *varna* system, although other castes dispute that hierarchical ordering.

Occupations have traditionally been closely tied to caste membership, although not always rigidly, and occupational choice has become more flexible with economic change and urbanization. With social change, a reduction in the importance of the traditional hierarchical system to something more like a kinship system might have been expected. Caste is indeed less important than before in terms of the external markers of caste identity and economic well-being, especially in urban areas. However, it has become politically important, with castes transformed into interest groups because of the potential for political mobilization on caste lines. This is manifest in electoral politics, with castes seeking representation in national and State legislatures to gain access to political power, and the rival parties competing for control of the national government (Congress and the Bharatiya Janata Party) attempting to assemble support from coalitions of a variety of castes and regional caste-based parties.



In addition, it has been recognized for nearly a century that disadvantage is associated with membership of certain caste and other groups. Policies of positive discrimination have been pursued since the 1930s, with reservation of places in educational institutions, employment and elected bodies for people belonging to castes considered to be economically and socially 'backward'. Reservation in education and public sector jobs continued after independence, especially since 1990. Access to the benefits of reservation depends on being recognized as a member of one of the Scheduled Castes (SC), Scheduled Tribes (ST), Backward Castes (BC) or Other Backward Castes (OBC). Although reservation has been important in enabling members of disadvantaged castes and Dalits to gain access to economic and political opportunities, colonial census practices and reservation have also reinforced and politicized caste identification and hardened boundaries between castes.

Some analysts believe that it is no longer appropriate to talk of a caste 'system', in which castes are inter-related and interdependent in a rigidly stratified social structure. Instead, they conceive of caste as a structural principle of society, which acts as a basis for interest articulation, collective mobilization, competition and social movements. The extent to which caste is significant for access to political office and services and other benefits and/or as a basis for discrimination continues to be disputed.

## **2.2 Religion, culture and secularism**

### **2.2.1 Religion**

There is no consensus on a definition of religion within or between the disciplinary traditions that study religion and society, which include those that study religion from within, providing reflection on and interpretation of the religious traditions themselves (theology and related disciplines) and those that seek to understand religion as a social phenomenon (the social sciences).

Theology and related disciplines (such as Islamic studies/jurisprudence and some branches of philosophy) aim to provide reasoned discourses to understand, explain, critique, defend or promote a religion – they are generally situated within the religion concerned, accept its basic truth claims, and are concerned with interpreting its beliefs and teachings. In addition, they may detail how to live in conformity with those beliefs and teachings, which generally include views about the right social ordering (of families and societies). Often, there are considerable differences in interpretations and

views both over time and between individuals and scholars associated with different denominations or schools of thought.

Most of the social sciences, in contrast, are not concerned with the truth claims of a particular religion and instead study the implications of religious belief and organization for the nature of society. Within the social sciences, there is no one agreed definition of religion – definitions can be substantive, functional or contain elements of both.

- **Substantive definitions** concentrate on what religion *is*: the cross-cultural attributes of religion that distinguish it from other social phenomena, particularly belief in a transcendental reality or spiritual being (the sacred), religiosity (signified by adherence to a set of beliefs and practices) and affiliation with a religious organization.
- **Functional definitions** are concerned with what religion *does*: the roles it plays in the construction of people's worldviews and social relationships, and in wider socio-political organization. For example, a religion generally offers answers to cosmological questions about the nature of being, the universe, humanity and the divine. The functions of religion in society may be considered positive or negative (or a combination). For example, for Marx religion plays a crucial role but as a response to the social alienation inherent in the capitalist system, while Durkheim was interested in its role in maintaining social cohesion, and Weber in its role in providing a system of meaning rather than its social function.

Critics of purely functional or substantive definitions argue for a concept of religion that contains elements of both.

For example, Frank Whaling's model consists of eight components found in all religions; religious community, ritual and worship, ethics, social and political involvement, scripture/myth, concept, aesthetics and spirituality. Beyond these aspects [he suggests] lies a 'transcendent reality' in each religion that has some similarities. For a Christian this is God, for a Muslim Allah, for a Jew Yahweh, for a Hindu Brahman, and for a Buddhist Nirvana (Whaling, 1986, p 38). Likewise, all religions have a 'mediating focus', which provides a link to the 'transcendent reality': "Christ for a Christian, the Koran for a Muslim, the Torah for a Jew, a personal deity or the Atman for a Hindu, and the Buddha or the Dharma for a Buddhist" (Whaling, 1986, p 38).

Religion and the English words used to talk about it, such as faith or belief, do not necessarily translate directly into other religious traditions and languages. The central meaning of the word ‘faith’ is similar to ‘belief’ or ‘trust’, although it implies a relationship with a transcendent reality, the existence and nature of which cannot be logically proven or objectively known – thus faith refers to belief in the truths of religion, and ‘a religion’ to the group of people who express a belief in a divine power and regard a particular source of knowledge or teaching about that power as authoritative. While these ideas of faith and divinity might characterize Christianity, it is doubtful whether they are equally applicable to religions that are not theistic, for example, Buddhism (the Buddha is regarded as a human being of great spiritual achievement, an example rather than a deity).

In the major Indian languages, ‘religion’ might be translated as *dharm*. ‘Faith’ might be translated as *astha*, but this is close to ‘belief’ in English: conviction of the truth of a proposition. ‘Faith communities’ would be *sampradaya*, but this means ‘sects’ in English – a narrower concept. In Arabic (and, by derivation, languages such as Urdu or Kiswahili), there are words for ‘religion’ meaning way of life – the sum total of a believer’s faith and practice (*deen* in Arabic, *dini* in Kiswahili) and ‘belief’ (*aqeedah*, meaning any religious belief system or creed, and *eeman*, referring to personal faith or belief). The widespread use of the term faith in contemporary America, where it is linked with the rise and political influence of the ‘religious Right’, has given it new and controversial connotations in many developing countries (see Section 2.2.4).

A religious (or faith) tradition refers to a religious movement that to some extent shares a history, culture and common body of teachings, but is generally comprised of more than one sect or denomination, each with more or less distinctive teachings, practices and organizational forms. A sketch of the origins and core concepts of some of the major religious traditions is given in Box 4, with links to sources of further information. Oliver (2010) provides a useful short introduction to a dozen religious traditions.

## Box 4: A sketch of the origins and central beliefs of some major faith traditions

**Islam** originated in the Arabian peninsula in the 7<sup>th</sup> century CE, after the prophet Muhammad, a prosperous trader living in Makkah, claimed to have received a series of revelations from God transmitted by the angel Gabriel, which he memorized (Kroessin, 2008). Later these were written down by Muhammad himself or others and compiled into the *Qur'an* (recitation), which is believed to be the word of God. In 622 Muhammad and his followers fled from persecution in Makkah to Medina, where he expanded his role from religious to community leader, a partnering of religious and administrative affairs that would become standard practice in future Muslim empires. By 630, Makkah fell with little resistance, later becoming the spiritual centre of Islam. After his death in 632, Muhammad was succeeded by four caliphs (deputy or successor) and these in turn by a series of dynasties and empires. Islam spread to Southern Europe (particularly Spain), North, East and West Africa, and large parts of Asia by both trade and conquest.

The initial split between Sunni and Shia Muslims was linked to a dispute over who should be the prophet's successor, although other differences between and within the two sects have subsequently resulted in the emergence of a large number of schools of thought and sects. Today about 85 per cent of Muslims are Sunni. Sufism is a mystical strand that exists alongside the orthodox strand of Islam. It is sometimes regarded as a threat to traditional Islam and sometimes as a source of renewal.

The *Qur'an* and the practices of the prophet Muhammad (the *Sunnah* or trodden path) are regarded by the vast majority of Muslims as the only foundation of Islamic legal and theological thought. Muslims are generally required to observe five pillars of Islam:

- profession of faith or *shahadah*: a declaration of belief in the oneness of God (*tawhid*) and acceptance of Muhammad as his prophet.
- ritual prayer (*salah*) five times a day at specified times, facing Makkah
- giving of alms, primarily *zakat* (normally 2.5 per cent of wealth annually), but also other forms of voluntary giving.
- fasting from sunrise to sunset during the month of Ramadan
- perform the Hajj (pilgrimage to Makkah), at least once during every Muslim's life.

In addition, Shia Muslims consider three additional practices to be essential: *jihad* - struggle with evil and to promote and defend the faith; living a virtuous life; and desisting from evil. The most literal interpretations of Sunni Islam are associated with Salafism or Wahhabism, the influence of which has spread far beyond its base in Saudi Arabia.

One of the *hadiths* (narrations from the Prophet) lists six beliefs (*iman*), while *ihsan* denotes striving for perfection in worship. *Shari'a* is law based on the *Qur'an* and *Sunnah*, gradually codified and elaborated by various schools of jurisprudence: it concerns virtually all aspects of life and society, is seen as an expression of divine will, and governs both acts of worship and human interaction.

**Christianity** is based on the spiritual experience and teachings of Jesus of Nazareth, a Jew who lived in Palestine, at that time a Roman colony. He was perceived by some to be the Messiah born, according to predictions in the Jewish tradition, to generate a new period of Jewish nationhood. After only three years, he was executed, but his immediate disciples continued to spread his teachings, as well as the belief that he had been resurrected three days after his death. Initially a minority belief system within Judaism, as more non-Jews became Christian the new community moved further from its Jewish roots, becoming the accepted religion of the Roman world in the 4<sup>th</sup> century CE. The first of many creedal statements of belief was produced at that time (Kim, 2007).

Doctrinal differences and the establishment of two capitals (in Rome and Istanbul, then Constantinople) led in the 11<sup>th</sup> century to a division between Roman Catholicism and the Orthodox Church. Subsequently, the increased power and influence of the Catholic Church in Europe was counteracted by increased literacy, translation and printing of the Bible, resistance to various papal practices, and growing nationalism. The Lutheran church was established in Germany in the 16<sup>th</sup> century and was followed by other Protestant denominations elsewhere in Europe. Christianity spread to the Americas through conquest and migration, and later to Africa and Asia through missionary activities closely associated first with trade and later with colonialism. Originating in the US at the beginning of the 20<sup>th</sup> century, the fastest growing movement within Christianity has been Pentecostalism and related charismatic movements, now estimated to account for a quarter of all Christians worldwide.

Christianity is a monotheistic religion that draws on Jewish tradition as well as accounts of the life and teachings of Jesus and other writings of the disciples. It is based on the idea of a single God with three forms (God, who created the world and is protective of human beings; Jesus, believed to be 'the Son of God' sent to be born on earth; and the Holy Spirit, which dwells in all believers). Jesus is believed to have possessed all the essential qualities of God and to have sacrificed himself to save human beings from sin and enable those who believe to look forward to a personal life after death. The books of the New Testament include symbolically important stories of Jesus' life and teachings that provide the main source of ethical guidance for Christians. Pentecostal and charismatic Christians emphasize spiritual practices such as speaking in tongues, faith healing and prophesying and believe strongly that God plays an active role in everyday life, including rewarding believers with material prosperity (Pew Forum, 2006).

**Hinduism** does not have a key historical teacher or prophet, a geographically identifiable location for its beginnings, or an ecclesiastical infrastructure. Instead it is a loose collection of philosophies and groups, on which the term Hinduism was imposed by outsiders (e.g. British colonialists, Christian missionaries and western 'orientalist' scholars). The term only came into widespread use in the 18<sup>th</sup> century, as a colonial response to the perceived need to classify the religious beliefs and practices of the majority of the Indian population as a 'religion'. At that time, beliefs and practices based on the Sanskrit texts and associated with the priestly Brahmin caste were classified as Hindu, rather than the pragmatic village or popular religion in which most people were engaged (Tomalin, 2009). Today, the enormous variety of beliefs and practices that characterize Hinduism draw on a wide selection of myths, stories and written sources, but the lived tradition should not and cannot be read off from the texts.

**Buddhism**, which originated in NE India, does not hold with a belief in a transcendental deity or supernatural beings. Instead, the Buddha (about 485-405 BCE) taught that craving for things in the world and the belief in a discrete individual self, to which we are attached, together condemn us to *samsara* (the endless cycle of rebirths). To overcome craving and attachment, achieve enlightenment, and thus escape *samsara*, he set out an 'eightfold path' of right understanding, thought, speech, action, livelihood, effort, mindfulness and concentration, to be pursued by some in the world and others in monastic orders that renounce the world. The emphasis is on the potential for all to achieve enlightenment through meditation and living well, according to certain precepts or rules. Buddhism rejects the idea of a caste hierarchy, lay Buddhists gain merit from supporting monastic communities, and monks and nuns serve communities in practical ways. The relative emphasis on meditation and action varies between Buddhist traditions (Tomalin, 2007b).

**Sikhism** is a monotheistic religion based on the teachings of Guru Nanak (1469-1539) and ten successive gurus (Tatla, 2008). Nanak criticized 15<sup>th</sup> century Hinduism and Islam, putting forward an alternative vision based on a single all-powerful God and the belief that the main aim of life is to attain liberation from perpetual suffering through reincarnation by achieving a balance between complete renunciation of this life and resistance to evil. It firmly situates salvation in this world, based on beliefs, practices and values that foster active participation in social life and worldly affairs. His successors added to Nanak's precepts and eventually compiled them into a holy book, the Guru Granth, which has lain in the Sikh temple in Amritsar since 1604. The tenth guru transformed Sikhs into a formal religious community, the Khalsa Panth (brotherhood of the pure) and specified that men's personal attire should include five items that would signify their identity as Sikhs. Sikh ethics are based on the Guru Granth and other sacred literature, codes of practice (*rahitnamas*) and stories of episodes from the lives of the Gurus that suggest appropriate moral behaviour. Despite being a small religious minority in India (less than 2 per cent in 2001), there are over 19 million Sikhs, 80 per cent of whom live in Punjab, where they are in the majority.

**Traditional or folk religion:** beliefs and practices to which the labels 'traditional' or 'folk' are attached have several of the characteristics of religion referred to above: they involve a sense of the spiritual realm, provide ways for people to make sense of what happens to them, embody ideas about right social ordering and have institutions that ensure that beliefs, rituals and authority structures are continued from generation to generation (Alolo Alhassan, 2007).

For example, traditional religion in Africa is generally characterized by belief in a supreme being who created and ordered the world, with lesser divinities or spirits (including ancestors) who are more accessible and are sometimes believed to act as intermediaries, helping to maintain social order and withdrawing their support if the living behave wrongly (Pew Forum, 2010, p 6). Failures to fulfil social responsibilities or violations of taboos are widely believed to result in hardship, suffering and illness for individuals or communities. Religious specialists, such as diviners and healers, are called upon to discern the roots of misfortune and to prescribe rituals which can, it is believed, re-establish order and restore wellbeing. African traditional religions tend to personify evil. Believers often blame witches or sorcerers for attacking their life-forces, causing illness or other harm. They seek to protect themselves with ritual acts, sacred objects and traditional medicines. The primary role of these beliefs and practices is to provide for human wellbeing in the present as opposed to offering salvation in a future world (Alolo Alhassan, 2007).



Because beliefs and practices vary across ethnic groups and regions, some believe that there are many traditional religions, while others see many common beliefs and practices. In some instances, these are not given the name 'religion' by their adherents (for example, the African traditional beliefs that are held by people who see their **religion** as Islam or Christianity). Should they be regarded as 'culture' rather than 'religion'? Many think not – they consider that traditional or folk systems of beliefs and practices have many of the substantive and functional characteristics of Islam, Christianity and other traditions, and so should be regarded as religion, even though their organizational forms and the institutions that reproduce the beliefs and practices are informal rather than formal.

For the 'religions of the book' (e.g. Judaism, Christianity, Islam), religion is essentially a set of core beliefs and teachings that among other things specify (or suggest) how to live in accordance with the principles of the faith tradition and how society should be ordered. Religious teachings are thus embodied in people's lives and constantly reinterpreted and acted upon in the context in which they live; they cannot be separated into a purely private sphere (Deneulin with Bano, 2009). Interpreters (and interpretive traditions) lie along a spectrum:

- Those who insist on a literal interpretation of the texts (often called fundamentalists). For example, in most African countries, three quarters or more Muslims and Christians (90 and 87 per cent respectively in Nigeria) believe that the Bible/Qur'an is the literal word of God (Pew Forum, 2010, p 26).
- Those who admit that there is some historical evidence to back up the texts, for example, most Christians.
- Those who regard the sources as myths - stories that are not intended to be accurate historical accounts of events or people, but to tell us "something profoundly true about our humanity...[and] how to live more richly and intensely, how to cope with our mortality, and how to endure...suffering" (Armstrong, 2010, p 3-4). Myths enable us to acquire knowledge in a different way from reason (pragmatic, practical thinking) and provide us with guides to living; inevitably they reflect the culture of the time and place in which they were assembled and written down.

For some, the idea of religion as a set of core teachings and beliefs has shortcomings.

- First, it pays little attention to **spirituality/mysticism**: personal religious or mystical experience that is attributed to awareness or experience of god/gods, the spiritual or the sacred; which may not be associated with a particular set of teachings or rules; which may or may not be associated with religious rituals and practices; and which may or may not be associated with adherence to a formal religious organization.

- Second, it privileges 'belief' (that texts or propositions are true - orthodoxy) over 'right practice' (active commitment to living out religious injunctions - orthopraxis). Christianity does indeed put more emphasis on beliefs than other religions – Islam emphasizes detailed rules to guide behaviour rather than elaborate statements of belief, while Hinduism and Buddhism concentrate on ritual practices and personal transformation rather than uniformity of belief.
- Third, it implies that the boundaries between traditions, sects, schools of thought or denominations are clear, whereas in practice, they are often blurred – religious ideas and beliefs are often influenced by and assembled from more than one source (syncretism). In particular, followers retain elements of earlier belief systems, such as folk religions or their pre-conversion beliefs. For example, many Muslims and Christians in Africa retain traditional beliefs (such as a belief in witchcraft) and continue to practise some traditional rituals; while many Buddhist converts from Hinduism in India continue to worship Hindu deities and participate in Hindu rituals.

Although religion is not a separate sphere of life for most adherents, interpretations of many other aspects vary within each faith tradition. Moreover, as is clear from the brief sketches in Box 4, religious traditions have different ideas about the role and nature of religion. These differences are so great that they may even call into question the cross-cultural applicability of the concept of 'religion', which is so closely linked to Christianity and thus with mainstream development thinking and practice. In addition to the differences within and between religious traditions, interpretations of religious teachings and the ways in which religions are organized constantly evolve in response to changes in the contexts in which adherents live.

In addition to the challenges posed by translating concepts and ideas emerging out of one religion or language to others, contemporary disciplinary boundaries are arbitrary: they are the product of increased specialization amongst scholars during the expansion of knowledge associated with the European enlightenment and reflect the ferment and debates of that time, including contests between different views of the nature of reality and knowledge. Although 'insider' disciplines may be mainly concerned with interpreting religious stories and teachings, many also consider how religious teachings can be interpreted in practice (for example, social theology, Islamic economics). The social sciences constantly borrow ideas and methods from each other (for example, economists' recognition of social capital). In addition, multidisciplinary fields of study have emerged (for example development



studies, religious studies). Furthermore, although social science supposedly adopts the objective 'outsider' stance towards knowledge of the natural and physical sciences, in practice all social science analysis is influenced by the values and cultural assumptions of social scientists themselves, many of whom are adherents of a particular religion and may accept its truth claims.

### **2.2.3 Religiosity**

Religiosity (or religiousness) broadly refers to aspects of religious activity and belief, in other words *how people are religious* (practising rituals, retelling myths, referring to religious symbols, accepting certain beliefs and/or attempting to live in accordance with religious moral and ethical injunctions). However, it is more often used in a narrow sense to denote *how religious people are*, with respect to various dimensions or components of religion, for example, how frequently they engage in various religious practices, how overtly they display religious symbols, or how firmly they hold to various beliefs. Religiosity interpreted in this way lends itself to observation and measurement. It has been the focus of many quantitative studies that seek to ascertain whether there are correlations between religiosity and various other dimensions of people's lives (for example, psychological traits, happiness, health status or personal behaviour) and characteristics of the societies or countries in which they live (for example social cohesion, rates of economic growth).

While religiosity in the sense of the public observance of religion has declined in most European countries, it has remained high elsewhere and appears to have become more common and overt in recent years in some parts of the world.

### **Box 5: Frequency of attendance at religious services**

In Africa, recent surveys show that the vast majority of both Christians and Muslims attend religious services at least weekly, pray at least once a day and fast during Lent/Ramadan. That this has probably changed little is illustrated by data for the only two African countries in the World Values Survey for which surveys are available for three dates: in Nigeria, 88 per cent of respondents in 1990 claimed to attend religious services other than weddings, funerals and christenings once a month or more, 89 per cent in 1995 and 95 per cent in 2000; in South Africa, 70 per cent of respondents in 1995, 68 per cent in 2000 and 70 per cent in 2007 claimed to do so.

It is more difficult to discern trends from the data for the limited number of countries in other parts of the developing world for which three surveys are available:

- there is a clear downward trend in the frequency of attendance at religious services in Argentina (from 56 per cent in 1981 to 39 per cent in 2007) and a less clear one in India (71 per cent in 1990, 55 per cent in 1995, 51 per cent in 2000, 60 per cent in 2007)
- the proportions attending religious services have remained at roughly the same level in Chile (around 45 per cent), Mexico (around 65 per cent) and Peru (around 64 per cent)
- an upward trend is evident in Brazil and China since 1990 (from 1 per cent to 19 per cent in 2007 in the latter).<sup>3</sup>

### **2.2.4 Religious organization**

The ways in which different religious traditions are organized is significant, especially when considering the links between religion, politics and society. They vary between the traditions, sects and denominations and, in addition to particular religious beliefs and practices, are linked to

- the sources of authority over adherents and the nature of religious leadership; how leaders and decision-making structures operate to secure the future of a sect, school of thought or denomination; and how the religious body relates to the state and other social organizations.
- the relative importance and roles of lay people, religious specialists, clergy and people who renounce their worldly lives (monks, nuns, mendicants etc)
- the ways in which teachings are transmitted and financial support for the religious organization is secured
- the scale, scope and nature of welfare and other services provided.

Religious organization is influenced by the origins of a tradition, sect or denomination in time and space and the experiences of its early adherents, including their relationships with political and existing

religious power holders. The extent to which early organizational arrangements persist or change as traditions, sects or denominations spread, fissure and reform varies. The arrangements include local congregations, wider structures and organizations with more or less autonomy from the main religious body. Many analyses of religion neglect these aspects, yet understanding their nature and significance, and the similarities and differences between religious traditions, is important when considering the actual and potential role of religious organizations in development.

- **Congregations:** All religions have a form of local organization, which is generally the focus for adherents' ritual practices, an important venue for learning about and reinforcing adherents' knowledge of the religious tradition (myths, beliefs, ethics etc), and plays a key role in teaching children about the religion. Religiously mandated giving (for the upkeep of the tradition, its buildings and clergy, as well as for charitable purposes) is often organized at this level. In addition to religious services (e.g. rituals, festivals or sacrifices, arrangements for weddings and funerals), local congregations may provide both sources of social capital and welfare services to their own members. However, in some cases service from adherents is expected rather than local congregations being a source of assistance. Congregations may also provide welfare services to the wider community, especially those in need, such as the indigent, orphans, the disabled or people living with AIDS, which may involve them in founding or supporting facilities such as hospitals, schools or orphanages.
- **Wider structures:** The ways in which local congregations fit into wider local, regional, national and international structures varies between and within the faith traditions. The organizational arrangements and the nature of the relationships between the structures expresses and influences the sources of authority over adherents; how leadership is exercised and decisions are taken; funding arrangements, the characteristics, recruitment and support of paid staff; and the nature of support expected from and provided to other bodies within the tradition, sect or denomination. Some have evolved a formal hierarchical structure (for example, the established Christian denominations) while others are loosely and informally organized.
- **Other religious organizations:** most religious traditions have spawned a variety of other organizations, with different forms, purposes, relationships with the main organizational expression of the religion, autonomy and funding between and within traditions. Various ways of linking such organizations with each other have evolved, as well as forging, maintaining or regulating their relationships with the hierarchical religious leadership and formal decision-making structures, if they exist. These include more or less voluntary networks and associations, as well as relationships of control and accountability.

## Box 6: A sketch of the organizational arrangements of some faith traditions

**Islam:** the mosque (*masjid*) is a place of prayer, teaching about Islam, learning Arabic, listening to the Friday sermon and discussing religious ideas. Many have a school (*madrassa*) attached and some function as law courts. The religion has always been regarded as the basis for law and governance. Originally organized along dynastic lines, with religious and political leadership merged in the position of Caliph, Islam was associated between the 8<sup>th</sup> and 13<sup>th</sup> centuries with the establishment of universities, libraries, observatories and hospitals. However, many were destroyed by invaders such as the Mongols and Muslim culture, science and technology declined.

Sunni Muslims recognize four major legal traditions or schools (*madhabs*) of jurisprudence that provide guidance on worship and practical affairs: Hanafiyyah, Malikiyyah, Shafi'iyyah and Hambaliyyah. All four accept the validity of some interpretations, but there are also differences in their interpretations and area of geographical influence. In addition to these sects, various others have emerged, for example Salafism/Wahabism in 18<sup>th</sup> century Saudi Arabia, which claims to be a reform movement that derives its teachings from the original sources and the understanding of the earliest Muslims, and the Ahmadiyyah movement, which emerged at the end of the 19<sup>th</sup> century and is held by many Sunni Muslims to be heretical. Senior *madrassas* and *ulema* (scholars) are associated with the various schools of thought, performing important teaching and legal functions. In Sunni Islam, the term *imam* is used to refer to various forms of religious leadership, ranging from a leader of small group prayer to a scholar of religion, none of which involve religious ordination. In Shia Islam, disputes over who should hold the most senior position (*Imam*) have led to splits (for example, by Ismailis).

Sufi orders (*tariqas*) focus on the mystical aspects of Islam – members seek the ultimate truth through spiritual practices. Each *tariqa* has a leader or spiritual director, generally nominated by his predecessor, and each student (*murid*) a guide (*murshid*). The orders were important in the spread of Islam to many parts of the world, including Indonesia, China and sub-Saharan Africa, where they are still important. Another large and influential Muslim organisation is Al Ikhwan al Muslimeen (The Muslim Brotherhood), founded in Egypt in 1928. This Sunni movement seeks religious reform and to establish a Caliphate or unified Muslim state. It has branches in many Muslim countries. In addition, contemporary Islam is characterized by a variety of international pietist and political movements, such as the Deobandi movement (Sunni revivalist), Tablighi Jamaat (grassroots pietist) and Jamaat-e-Islami (Sunni political)

**Christianity:** the basic organization in Christianity is a local church congregation. A local church (especially if associated with a new religious movement such as an African Independent Church) may be autonomous – established and led by an individual and entirely dependent on funds raised by members of the congregation. However, many of those who start an independent church seek to evangelize. If successful in their church planting endeavours, sooner or later a denominational structure emerges, to enforce the authority of the leader, coordinate congregations, manage funds, codify doctrines and regulate religious practices. The roles, responsibilities and decision-making powers of paid clergy vary between denominations, as does the extent to which members of congregations are responsible for church operations and

have the power to make decisions. Over and above day-to-day maintenance of a church's religious services and building, many congregations undertake activities in their local communities and raise funds for other purposes, including missionary work.

Typically, individual congregations are grouped into administrative units (for example, districts in Methodism, dioceses in the Catholic and Anglican churches), and these in turn into larger bodies, generally organized at the national level (for example, archdioceses, national Catholic Bishops' Conferences). The relative power of lay representatives and paid clergy in such bodies varies between denominations. Regional and worldwide administrative arrangements vary from loose alliances (e.g. Pentecostal churches) to more formal coalitions (e.g. the Anglican Communion) to the strongly hierarchical structure of the Catholic Church. The latter has a powerful leader at its apex (the Pope), who exercises strong spiritual authority, presides over the governing body of the Church (the College of Cardinals) and the curia (the legal and administrative structure), and administers the Vatican City State, although his secular authority has declined markedly since the Reformation. In each region of the Orthodox Church, a patriarch is responsible for the work of the bishops (and they in turn for other clergy).

Two other organizational forms are important in Christianity:

- basic Christian communities, which are small groups within congregations formed to revitalize worship and enable members to practise their faith at the local level. The movement started in the Catholic Church in Latin America and has subsequently spread not only to Catholic Churches in many other parts of the world, but in a similar form to other churches, such as the Anglican Church.
- monastic communities associated with some denominations (generally Catholic, Anglican or Orthodox): groups of men or women who have renounced aspects of human life to live contemplative lives or devote themselves to community service. Important centres of learning and politically influential in mediaeval Europe, many of these accumulated enormous estates and great wealth. They are much less important and numerous today, but some still play important roles in education and other services, such as health.

The hierarchical paid leadership and strongly developed organizational capacity that typify the mainstream Christian denominations are associated with a proliferation of other types of organization, many of which are active in wider society and some of which have a worldwide reach. They include

- substantial organizations established by the higher levels of a church (such as the Justice, Peace and Development Commission of the Catholic Church, which has offices at the diocesan level)
- organizations for categories of members (such as the Mothers' Union in Anglican Churches), which may also undertake activities outside the church
- advocacy movements seeking reform within a denomination or in wider society, the latter sometimes involving collaboration between denominations (such as the Jubilee Debt Campaign).

**Hinduism:** the ideal of the religious recluse is influential in Hinduism – both young and elderly men may become *sadhus* (wandering mendicants). *Gurus* (teachers), who may also adopt ascetic lifestyles, play important roles. People learn about the religion from a *guru*, who is more likely to have established an *ashram* where people go to learn and meditate than to be associated with a temple, while much religious learning, worship and practice take place within the home. Temples of various sizes are administered by priests trained to perform the necessary religious functions, but ordinary Hindus may only visit them intermittently and, while sometimes temples are associated with the provision of welfare services, they are often not engaged in welfare provision. Leadership and organization in Hinduism is thus individualistic and diverse, in marked contrast to religious traditions such as Catholicism.

While some *gurus* only have one or two disciples, others found large organizations with a variety of spiritual, philanthropic and political objectives, some of which have become transnational in recent decades. Alms giving (*dana*) and service (*seva*) are considered to be part of Hindus' duty/*dharma*. They encourage individual charity and ensure a supply of funds and volunteers for organizations that give assistance to the poor and provide services such as education. The rise of Hindutva (Hindu nationalism) during the 20<sup>th</sup> century has been associated with the emergence of nationalist organizations with cultural and political objectives, such as the RSS (Rashtriya Svayam-sevak Sangh) and its associated organizations. These have also tried to penetrate existing Hindu organizations (the so-called Hinduization of civil society).

**Buddhism:** Founded by Gautama Buddha in the 5<sup>th</sup> century, the Buddhist *sangha* (community) is comprised of orders of monks (*bhikkhus/bhiskus*) and nuns (*bhikkhunis/bhiksunis*) and lay men and women (*upasaka* and *upsika*). In the past, monks and nuns lived austere celibate lives of meditation, wandering and begging. Today, some continue to do so, especially in the Theravada tradition of Thailand, Burma, Cambodia and Sri Lanka, while others are involved in teaching, the study of scripture and the administration of the *sangha*. In addition, in some other countries there are lay Buddhist clergy and non-celibate monks. Female monastic orders died out in the Theravada tradition in the 14<sup>th</sup>-15<sup>th</sup> centuries and never existed in Tibet, so although women take on other religious roles, the status and future of female Buddhist clergy continues to be debated and they generally do not have the same rights and privileges as monks.

Buddhists who remain in the world support the monastic community through the giving of alms, and the monastic community in turn has always played an important role in the provision of welfare and other services, including education. The responsibility to do so is particularly emphasized in some more recent variants of Buddhism, for example, Ambedkarite Buddhism in India and 'engaged Buddhism' more widely, and has led to the establishment of organizations devoted to community development.

**Sikhism:** founded by Guru Nanak in the Punjab in the 15<sup>th</sup> century, each of the first ten Gurus nominated his successor as the overall leader of the Sikh religious tradition. The tenth Guru ended personal Guruship in favour of the Guru Granth (the sacred book compiled by the fifth Guru). Locally, Sikh *gurdwaras* (temples) are the focus for worship, operate a kitchen that provides communal meals (*langar*) open to all and distribute charity to the needy. There is no established class of clergy or priests – *gurdwaras* are looked after by a *granthi* and managed by a committee and any Sikh can be asked to take on administrative responsibilities. Many historic shrines have attached schools, hospitals, libraries and other institutions.



From the outset, Sikh religious principles included social equality, work rather than ascetism and readiness to physically defend the Sikh community against external threats. More centralized than Hinduism, the religion's spiritual and administrative centre was established at Amritsar (now in Indian Punjab) in the 16<sup>th</sup> century by the 4<sup>th</sup> Guru. The Akal Takhat (the seat of Sikh religious authority and administration) (and four other Takhats established more recently) are headed by Jathedars. Legislation in 1925 provided for a body of Sikhs to manage the historic shrines, including the Golden Temple in Amritsar, the Shiromani Gurdwara Parbandhak Committee, which is elected by an assembly in which any Sikh can participate. Representing mainstream Sikhism, this has gradually expanded into a bureaucracy employing several thousand men and women responsible not only for the upkeep of historic shrines (including the appointment of Jathedars) but also for numerous educational institutions, hospitals and a scholarship programme.

The Sikh tradition includes an obligation to give alms and emphasizes collective action for the welfare of the needy, both within and outside the Sikh community, through the religious bodies mentioned above or organizations established for the purpose. In recent years, their concerns have expanded to include environmental issues. Some people respected for their devoutness and knowledge of the scriptures are designated *sants* and some of these establish *deras*, spiritual centres that may also provide services such as education or health care.

Sources: Oliver, 2010; Kroessin, 2008; Tatla, 2008; Tomalin, 2007b, 2009

There is much discussion of the role that civil society organizations can play in development policy and practice. Of course, the organizational expression of religious traditions (and many individual religious organizations) long predates contemporary development debates and practices, and many religious bodies resist being labelled civil society organizations. Because the 'development industry' emerged in Western countries committed to religion-state separation, and religious even-handedness, development agencies have either avoided working with religious organizations or have treated them like any other NGO. Although it has become clear in recent years that initial expectations about NGO roles and achievements were exaggerated, they remain important development partners.

In addition, renewed attention to religion in the public sphere in the 1990s, especially in the US, has encouraged governments to revive or build relationships with so-called 'faith-based organizations' to improve service delivery and address social problems. It has been recognized that the decline in religiosity in Europe is exceptional, with most other societies continuing to be highly religious. As the state's role in providing services has been reduced in favour of private for-profit and not-for-profit providers, the important and sometimes controversial contribution religious organizations make to

service delivery has been acknowledged, if seldom integrated into policy. In addition, the rise of political Islam, the apparent increase in inter-religious conflict and violence, and the 'war on terror' have challenged development agencies' understanding of the contexts in which they work and the strategies they adopt to achieve development objectives.

FBOs are commonly said (and often claim) to have advantages over other civil society organizations. They

- draw on spiritual and moral values
- can mobilize religious adherents estranged by secular development discourse
- have a strong organizational structure that reaches into remote and rural areas, and are trusted
- have links at the grassroots, making them close to the poor and enabling them to be responsive in their activities
- have a high degree of legitimacy, are well networked nationally and are usually embedded in politics and governance
- have international links, which may safeguard their autonomy and enable them to source funds
- are less dependent on donor funding than NGOs
- have capacity and expertise in some key development areas.

It is not possible to provide a single answer to the question: *Do FBOs have a comparative advantage in achieving development objectives?* Briefly, the reasons include:

- the categories of 'FBO' and 'NGO' are both complex: even typologies with more than two categories fail to capture all the types of organization or ways that religion manifests itself in explicitly religious or other organizations.
- the faith traditions and the types of organizations associated with them differ in many respects
- organizations operate in a great variety of contexts and
- there are methodological obstacles to both assessing performance and attributing development outcomes to the activities of individual organizations.

A more researchable question is whether and how do religious organizations make *distinctive* contributions to development and service delivery, with respect to

- inputs (the choice of activities, design of programmes, sources of funding)
- ways of operating (e.g. recruitment of staff, use of volunteers, choice of beneficiaries; use of religious teaching, symbols and practices)



- outcomes (results) and
- impact (contribution to development objectives such as poverty reduction or gender equality).

This will be explored further in Section 4.3.

### 2.2.5 Culture

A further complication in developing an understanding of religion and its role in development is the struggle to distinguish between religion and culture, itself a contested concept that may be seen as

- a distinctive set of practices
- a system of values and attitudes that sustains a way of life, or
- the evolving shared rules, values, ideas and methods through which members of a group deal with interactions with each other and outsiders, and with their environment.

A definition is provided by Verhelst with Tyndale (2002):

The complex whole of knowledge, wisdom, values, attitudes, customs and multiple resources which a 'community' has inherited, adopted or created in order to flourish in the context of its social and natural environment (Verhelst with Tyndale, 2002) (my italics round community).

They suggest that culture has three dimensions:

- The **symbolic** (e.g. values, symbols, archetypes, myths, spirituality, religion)
- The **social** (organizational patterns for family and community linkages and support, systems for management, including business management, and political systems for decision making and conflict resolution etc)
- The **technological** (skills, expertise, technology, agriculture, cooking, architecture etc).

Often these dimensions overlap e.g. in art, law and language. Even so-called 'traditional culture' is not unchanging; rather all aspects of a culture evolve in response to innovations and outside influences. Some approaches to development consider culture to be unimportant. These adopt materialistic ways of looking at the world, which assert the primacy of material things in determining human behaviour, rather than ideas or beliefs. They are associated especially with liberal economics, which tends to explain underdevelopment and development in terms of economic factors and forces, based on the assumption that these can be separated from other aspects of life and operate in the same way in every economy. Marxists emphasize the links between ownership of the means of production and social stratification in terms of class structures at the expense of almost everything else.

Both see culture as residual – Marxists see values that conflict with supposed reality as ‘false consciousness’; liberal economists consider that culture impinges on behaviour that would otherwise be economically rational. Critics assert that economists only bring in culture as an explanation when economic hypotheses are contradicted by the evidence, although there is also a danger in the opposite view – that the only things that matter are ideas and beliefs.

When the importance of culture began to be recognized in development economics, as noted above, it took the form of *modernization theory*. This drew on sociological ideas, especially those of Talcott Parsons. Parsons suggested that there are five *pairs of value orientations*, which can be combined in any way – the particular combination found in a society explains the role relationships adopted by members of that society and therefore its social structure. These contrasting values with respect to social roles are:

- *Affectively rewarding* roles are those that are emotionally satisfying (e.g. a child obeys his mother and expects approval in return), whereas in *affectively neutral* (rational) roles, the reward is emotionally neutral (e.g. wages for work).
- *Self-orientation* encourages or allows those playing a role to pursue their private interests, while *collectivity-orientation* implies that only the collective interest will be pursued.
- The obligations in a particular role relationship may be *particularistic* (to a particular person e.g. ‘I must help him because he is my kinsman’) or *universalistic* (the obligations apply to everyone met while performing the role e.g. ‘I must provide everyone with the same health care’, or ‘I will maximize economic profitability whoever I am dealing with’).
- An *ascriptive* role is allocated according to attributes a person has by virtue of birth (e.g. gender, family membership) while an *achievement-oriented* role or status is based on what a person achieves (e.g. a professional job).
- Roles that are *functionally specific* have a single function (e.g. employer/ employee in a modern industrial firm), while people in roles that are *functionally diffuse* have multiple relationships with each other (e.g. in an employer/ apprentice relationship the employer is a teacher and parental guardian, not just an employer).

According to modernization theory, therefore, development is said to require a shift from a society dominated by ‘traditional’ role relationships to one dominated by ‘modern’ role relationships. In this view, ‘traditional’ values are seen as obstacles to development, to be removed, and it is believed that

'modern' values and roles can be inculcated in a population, for example by education. Initially modernization theory regarded the westernization of the culture of developing countries as an inevitable result of the development of a western capitalist economic system. This was then turned round to suggest that, if the social and cultural values and characteristics that appear to be obstacles to economic development could be 'modernized', economic growth would follow.

This theoretical approach underlies several ideas about 'underdevelopment', for example:

- that social obligations apply primarily to the household (or kinship group), with the result that people do not hold suitable values to ensure that the public sphere functions effectively (Hyden's 'the economy of affection' in Africa)
- a 'culture of poverty' (Oscar Lewis), meaning that poverty generates its own way of life with its own patterns of behaviour and symptoms which are perpetuated from one generation to another, locking poor households into poverty because of their apathy, failure to participate in wider social institutions, and particular patterns of family life (Allen, 2000)
- that certain religions are more conducive to change and 'development' than others.

The failure of many development policies and projects has been attributed to their incompatibility with local culture. In response, socio-cultural compatibility has been urged on policy and project designers – the need to take into account people's aspirations, attitudes, mentality, values, beliefs, sense of the sacred and ideas about happiness/well-being. A study of 57 World Bank financed projects provided evidence to support this view. It examined the association between the socio-cultural fit (or misfit) of project design and the estimated economic rate of return at audit time, finding that the socio-culturally compatible projects studied had twice the average rate of return of the non-compatible ones (Cernea, 1991, quoted in Verhelst with Tyndale, 2002). More recently, the importance of culture has been acknowledged by the 'new institutional economics', in the form of culturally derived norms of behaviour that influence how people act in economic exchanges.

However, there is also a danger that advocacy of socio-cultural compatibility for development interventions will ignore the less desirable components of cultures e.g. discrimination on the basis of gender or age. In addition, other behaviour which is said to be 'culturally based' may well pose problems e.g. the problems posed for good governance by favouring some people over others (nepotism). Is the giving of gifts and favours by government officials to members of their family, clan or ethnic group 'corruption' or 'part of traditional culture', in which the primary loyalty of politicians and public officials is to their kin or ethnic group?

It is difficult to conceive of culture and religion as distinct spheres and probably impossible to analyse them separately. Generally, religious beliefs, specifically a notion of the sacred, are considered to be embedded in everyday life and to impact on people's socio-cultural identities, relations and practices, informing and determining the shape of everyday life. But culture also influences the shape of religious spaces and the identities and practices that are associated with them.

### **2.2.6 Religious values and beliefs**

Religion is an important source of values and beliefs. The former can be defined as the principles on which people draw to make decisions, while beliefs relate to the cosmological lens through which they understand the world and their place within it. Religion is not the only source of values: not only do non-believers have values, but also adherents' values are influenced by cultural traditions, global influences and trends such as increased consumerism.

Values and beliefs may

- form people's views about their place in the world
- influence their attitudes and behaviour
- underlie concepts of the right ordering of relationships in families and wider social groups
- determine the attitudes of different faith traditions to spreading their ideas and recruiting new adherents
- influence the ways in which a religion (and its subdivisions) is organized, which also affects the roles it plays in politics, service delivery and development.

Values are an integral part of every religion (and culture): they provide a basis for more specific ethics or morals. Most religions are associated with a value system that is often expressed as a moral code. The terms ethics and morals are often used interchangeably to distinguish between intentions and actions that are, according to religious or other precepts, good (or right) and bad (or wrong).<sup>4</sup> A further distinction can be drawn between normative morality, which defines what is right and wrong in any circumstances, and descriptive morality, which refers to what is considered right or wrong by an individual or social groups.

Some religious communities consider that moral principles have been revealed by the divine, sometimes in considerable detail, although inevitably further interpretation is needed to provide guidance for adherents on how they should guide specific actions, especially in the light of cultural changes and trends in religious scholarship. Examples of moral codes include the Ten

Commandments of Judaism, Christianity and Islam and the Five Precepts and the Noble Eightfold Path of Buddhism. In some instances, the principles have been developed into bodies of law, notably Shari'a (see Box 7). All religious traditions have developed means of transmitting values to their followers, ways of encouraging conformity and sanctions for non-conforming behaviour.

### Box 7: Religious values and morals as law

Most Muslims believe that Shari'a is derived from the divine revelations set out in the Qur'an and the example set by the prophet, described in the Sunnah (Kroessin, 2008). Since the 8<sup>th</sup> century CE, *fiqh* jurisprudence has interpreted and extended the application of Shari'a to questions not addressed in the primary sources by using secondary sources, including the consensus of religious scholars (*ijma*) and analogy from the Qur'an and Sunnah through *qiyas*. It is applied by judges (*qadis*). Shia jurists prefer reasoning (*'aql*) over analogy. *Fiqh* classifies behaviour into

- obligatory actions (*wajib*), for example, daily prayer, fasting, obligatory charity, performing the Hajj
- recommended actions (*mandub*), such as proper behaviour in matters of marriage, family life and funeral rites
- permissible behaviour (*mubah*): behaviour that is neither discouraged nor recommended.
- prohibited behaviour (*haram*), which is undesirable and may be sanctioned, but is not regarded as sinful
- repugnant actions (*makruh*), which are both sinful and criminal.

*Fard* and *haraam* actions are required or prohibited in the Qur'an, while the remaining categories draw on the life and sayings of the Prophet Muhammad, as recorded in the Sunnah. Shari'a law therefore deals with personal matters (such as prayer, fasting, diet, hygiene and sexuality), family relationships, crime, politics and economics. It also specifies certain punishments (*hudood*).<sup>5</sup> In theocratic states, Shari'a forms the basis of criminal as well as personal law, although in theory a separation is maintained between the *ulema*, who are responsible for interpreting it, and political leaders, who are thereby prevented from reinterpreting it in their own interest. Elsewhere, Muslims are permitted to use Shari'a law to regulate personal and family matters, such as marriage and inheritance. Interpretations vary between the liberal and fundamental ends of the spectrum, schools of thought, countries and scholars (*ulema*). In addition, Muslims are generally taught to follow some specific customs that appear in the Sunnah or characterized Arab society at the time, for example relating to greetings, personal hygiene and burial rites. The dividing line between cultural practices and divine revelation is blurred and contested.

In psychology, value theory refers to the study of the manner in which people develop, believe in and assert certain values and act (or fail to act) on them. In sociology, it is concerned with values held in common by social groups and how these change under different conditions. While some sociologists stress the importance of values as an independent variable (such as Weber, Durkheim or Parsons), others (such as Marx) deny or downplay their significance.

Values influence attitudes and behaviour, but the links between values or beliefs and behaviour are notoriously difficult to discern. Some studies (often referring to the US where data are available) purport to show a positive correlation between religiosity and moral behaviour, but the results of different studies vary and they are often contested on methodological grounds.

This leads anthropologists to study the myths, rituals and symbols people employ in their religious practices, when trying to understand their place in the world and when explaining why they behave as they do. For example, ideas about spirit possession are said to reveal how individuals and groups experience their personhood, social world and community identity, offering insights into perceptions of power and marginalization, community conflicts and internal personal struggles (Bradley, 2007). Sometimes links are detected between the apparent tendency for those possessed to be women and depictions of their sexuality, which is considered to have potential to be unleashed in destructive ways, while to cure illness believed to be linked to spirit possession, rituals are to appease the spirit responsible are needed. The meanings attached to symbols, rituals and myths are constantly reinterpreted, reflecting characteristics of and tensions within social contexts, as well as people's imaginings about how they would like their world to be. Seeking to discern the interpretations of the people concerned (an interpretivist approach) is believed to be the best way of developing an understanding of the values and beliefs that are expressed through myths, rituals and symbols. These feed into ideas about rights and duties, which are invariably strongly gendered, and also influence behaviour in complex ways.

Views about how religious traditions should be reproduced and spread vary both between and within the traditions. All religious traditions reproduce themselves through socializing children into the tradition and exercising sanctions against those who are regarded as undermining the tradition by their speech or behaviour. In addition, some denominations or sects have authority structures that seek to protect particular interpretations of the tradition's teachings, practices and myths. As noted above,

many religions provide guides to how people should live their lives, generally including ideas about witnessing to their values and beliefs through their religious and social behaviour.

In contrast to those beliefs and practices associated with a particular 'folk', which by definition would not be applicable to members of other communities, religions that claim superior or universal truths generally seek to persuade others to accept those truths.

The terms **mission** and **evangelism**, which are often used more or less interchangeably in Christianity, embrace elements of both witnessing to a religion and attempting to spread it. However, it is useful to use evangelism to denote the explicit and intentional preaching of the gospel, including an invitation to personal conversion. **Proselytism**, in contrast, has for some taken on negative connotations associated with attempts to convert Christians from one denomination to another, forced conversion or the offer of material inducements to convert. Similarly, in Islam, **dawa'ah**, inviting people to the faith, is usually associated with preaching to encourage (never force) conversion, although it also implies a duty through teaching and example to encourage fellow Muslims to live more pious lives.

The priority given to seeking converts has influenced the historical spread of religions, especially during the colonial period, with significant implications for post-independence politics, social relations and attitudes to religious expansionism. Contemporary practices fuel competition, particularly between branches of Christianity and Islam. This sometimes results in conflict and violence and may lead governments to regulate the behaviour of preachers and missionaries.

### 2.2.5 **Secularization and secularism**

The idea of the **secular** is perhaps the mirror image of religion. Secularization and secularism have distinct meanings:

- **secularization** refers to the declining prevalence of religious beliefs and professed adherence to a faith tradition, and the reduced roles played and influence exerted by religion in the public and private spheres
- **secularism** denotes political arrangements in which religious organizations play no official role in the machinery of the state.

The form of the 'wall of separation' between religion and the state varies, not least because religious ideas and the organizational expression of religions vary. Secularism implies that the state and the








religious entity have a discrete existence – applicable perhaps to some churches in post-enlightenment Europe and North America, but much less applicable to other religious traditions. In particular, Islamic scholars have traditionally held that to create an environment in which human beings are able to fulfil the purpose of creation (to worship God) (i.e. a society characterized by the welfare of all, social justice and harmony), a state (caliphate) governed by Islamic law is necessary, although not all Muslims would agree with this.

In practice, very few political regimes are either purely secular (differentiated) or fully integrate religion with the state. As a starting point for understanding the complex relationships between religion and the state, therefore, it is better to regard states as being somewhere on a spectrum between strictly secular and theocratic. Where on the spectrum they lie influences their reactions to expressions of political identity (such as political parties), the sources of political legitimacy on which they draw (such as a democratic mandate or support from leaders of social groups) and other matters of politics, law and policy. In general, if religion is integrated with the state, it is more likely that religious political parties will be permitted (and may even gain political control) and that heads of state will seek approval and support from religious leaders. However, in democratic systems, the influence of other interests (such as class) on voting is likely to prevent permanent domination by religious groups.

In practice, relations between religion and the state (the extent of differentiation or integration) are under continual re-negotiation, so not only do they change over time, they are also characterized by a greater or lesser degree of consensus or conflict (Singh, 2010). These two dimensions (differentiated/integrated and consensual/conflictual) are captured diagrammatically in the matrix shown in Figure 2, in which regimes can be located (and changes over time noted). Analyses using this framework show that there is not a straightforward association between level of development and degree of religion-state integration.



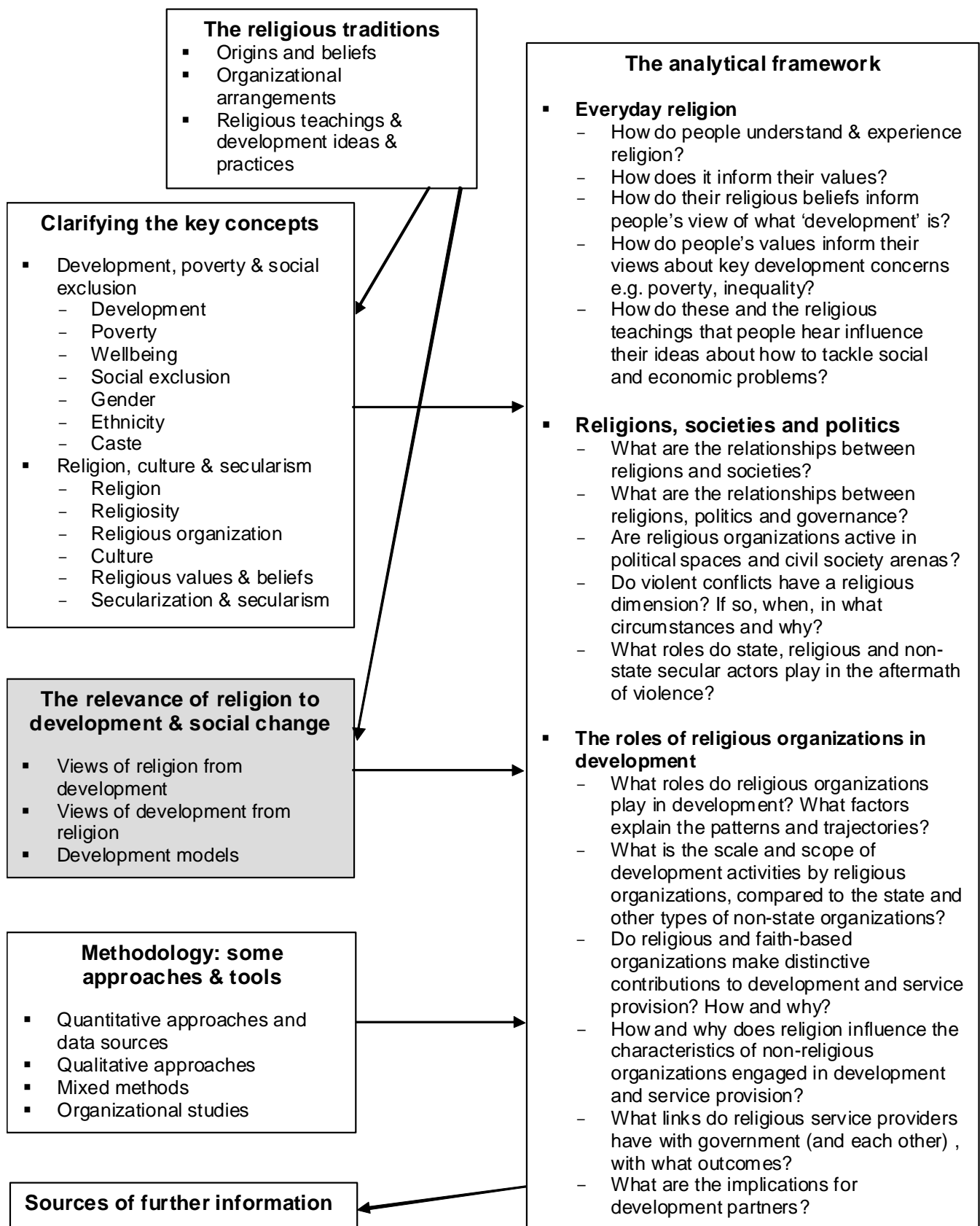
**Figure 2: State-religion relationships**

Degree	Kind of political regime	Consensual (Religious and state actors and citizens agree with the degree of separation/ integration)	Conflictual (The degree of differentiation/ integration is contested)
High   Low	<p><b>Differentiated</b> (religion and the state are constitutionally separate; they have autonomy to govern themselves: to appoint office holders, choose policies and carry out activities)</p> <p style="text-align: center;"> </p> <p><b>Integrated</b> (religion and the state are integrated)</p>		

Source: Adapted from Philpott, Daniel (2007) Explaining the political ambivalence of religion. *American Political Science Review*, 101(3), p 508 and Singh, G. (2011)

In Section 2, some of the concepts relevant to studying development, religion and the links between them have been reviewed, to provide analysts with some common definitions and a shared basic understanding. These can be seen as the building blocks of an analytical framework. In the next section, the focus shifts to another element of such a framework – the nature and effects of relationships between the key dimensions.

**Figure 1: A guide to analyzing the relationships between religion and development**



### 3 How is religion relevant to development and social change?

Development is essentially concerned with change, although often who identifies what change is desirable and how it can be achieved is controversial. There are an enormous variety of attempts to explain how and why social change occurs, each containing different assumptions about human motivation and behaviour, and the role of individuals, organizations and institutions (Green, 2008; Krznaric, 2007). They generally examine

- who or what was involved in the change, that is the actors involved – people and organizations that were changed, were active agents of change, facilitated change or resisted it, including social movements, political parties, security forces, elites, leaders and citizens
- the organizations and institutions, both formal and informal, that influence the relations between actors, including
  - Culture, caste and religion, which determine perceptions of right and wrong, what is socially acceptable, what is 'normal' in areas such as gender roles, or the acceptability of protest.
  - Evolving ideas and knowledge that determine what is seen as outdated, normal, correct, mistaken, or promising.
  - Family structures
  - Formal institutions e.g. the civil service, the rule of law
  - Political systems e.g. democracy
  - Nature of the private sector
  - Patron-client networks
- what strategies were used by all the actors involved to bring about the change
- how the context affected change – the characteristics of a context that promoted, permitted or presented barriers to change
- the process or pathway of change, which may be cumulative or discontinuous, chaotic or predictable, gradual or sudden, and involves the identification of particular routes, pressures, catalysts, tipping points and crises e.g. conflict, natural disasters, economic collapse, pandemics, elections, protests.

Krznaric's (2007) review of how analysts from a range of disciplines and various development actors have understood change concludes that the approach adopted by mainstream development organizations has been essentially reformist, with the result that the status quo has been maintained and they have failed to tackle the structural causes of development problems. He also notes that human society is characterized as much by continuity as change and criticizes many development actors for failing to recognize the contextual features which prevent change. As a result, he suggests,

- they draw on a limited repertoire of ways in which changes defined as desirable might be achieved (for example, focusing on policies and laws rather than attitudes, beliefs and relationships between people) and also
- over-estimate the likelihood that their interventions will produce the desired change (for example that donor programmes to build the capacity of civil society organizations will produce a vibrant, autonomous and influential civil society).

A first step in addressing the question posed in the title to this section is to pose two preliminary questions: what are development scholars' and practitioners' views of religion, and what views do religious traditions and believers hold about development? They are posed as separate questions for the purpose of analysis and this is appropriate for development or religious actors who have stayed aloof from the other field of belief and action. In practice, of course, many individuals are involved in both religion and development. Nevertheless, it is helpful to pose the questions separately at the outset.

### **3.1 Development scholars' and practitioners' views of religion**

Arguably, religion is one of the most enduring and powerful features of the context in many societies, through its influence on personal and social values and behaviour, as well as the structure and functions of religious organizations. It cannot, therefore, be ignored in seeking to identify and achieve development objectives, although it is by no means the only (or even the most important) factor to be considered in diagnoses of development problems and strategies to achieve social change and development objectives.

Those who study and practise 'development' tend to see religion as either an obstacle or a panacea. Those who think that religion should be confined to the private sphere of people's lives, who consider religious beliefs mistaken and invalid, and who think religious traditions and organizations are oppressive and backward regard it as an obstacle to egalitarian and democratic politics and progressive social change. Convinced adherents to a faith tradition, in contrast, believe that if only the religious principles set out in its teachings were to be adhered to, individuals would be more moral, less selfish people and societies better ordered. Many hold intermediate positions. For example, many religious people believe that religion is essentially a private matter and should be kept out of the public

sphere of social provision or governance. For yet others, it is an instrument that could be used to tackle obstacles and bottlenecks to social change and the achievement of development objectives. Of course, many recognize that diagnoses of religion as the obstacle or the panacea are over-simplified: religious traditions are not monolithic and unchanging, and it is universally acknowledged that no religious individuals or organizations put all their principles into practice. It is, therefore, better to see the range of views held by development analysts and practitioners as a spectrum. Nevertheless, the extreme views have been influential in the past and persist today among substantial groups of religious sceptics (or those who believe it should be kept out of the public sphere) on the one hand, and believers in certain faith traditions on the other.

Because the teachings of a religion suggest principles for the right ordering of society (e.g. justice, mutual respect, role of the family, gender relations), they embody ideas about what development ought to be and what characteristics a good society should have, although as noted above, there is often disagreement about how the written texts should be interpreted. Sometimes the principles and social rules derived from the teachings fit with mainstream ideas about development and sometimes they pose obstacles to the achievement of development objectives. Although much religion is indeed socially conservative, it should not be assumed that all religious actors are opposed to change. Nor is it useful to regard religion as an ideal, a panacea or an instrument. Rather than focusing selectively on those aspects of religion that are seen as positive or negative for development, Deneulin and Bano (2009) argue, religious traditions must be understood in their entirety.

The starting point for this analytical framework is therefore that 'religion' cannot be conceived of as a single factor – instead, it needs to be unpacked, in order to assess whether, when and why aspects of religion play blocking or facilitating roles in efforts to achieve poverty reduction and greater social equality. Thus its role in social change should be analysed in the same way as other actors, institutions and organizations.

### **3.2 Religious views on development in theory and practice**

One way of ascertaining religious views on development is to examine material produced by individuals and organizations within the religious traditions, as well as their academic interpreters, to identify the understandings of development that arise out of the core values and beliefs of each tradition.

Relevant principles and teachings include those that deal with key concepts underlying the notion of ‘development’: what is meant by development (and how it might be achieved), poverty (and its causes), wealth, inequality and wellbeing. They may also deal with particular development issues and approaches used in development policies and programmes. Some of particular interest include:

- gender roles and equality
- engagement in public life through politics, social movements, community organizations etc.
- ethical behaviour in public life
- livelihood strategies
- debt and credit.

Clearly the contemporary discourse and practice of development post-dates most religious teaching, which is not couched in terms of the conventional international development discourse. However, each religious tradition contains ideas about ‘right social ordering’ and, as discussed in Section 2.2, provides guidelines to individuals and societies about how they should live lives that are not just spiritually rewarding but also morally and socially responsible. These ideas have been interpreted in different ways over time and by different schools or denominations, so it is not possible to talk about a single Christian, Muslim or Buddhist view of development. Instead, interpretations of religious texts and stories vary, not only between schools or denominations, but also between the authorities responsible at the highest level and local religious specialists, between the official sources and everyday lived religion, and between places, where they are seen through the lens of differing cultural traditions.

An initial attempt was made to identify some of these views in a series of background papers for the Religions and Development Research Programme: Alolo Alhassan, 2007 (African traditional religion); Kim, 2007 (Christianity); Kroessin, 2008 (Islam); Tatla, 2008 (Sikhism); Tomalin, 2007b (Buddhism); and Tomalin, 2009 (Hinduism). Inevitably, the coverage of these papers varies between the religious traditions, depending on the disciplinary background of the writer, his or her own interests and preoccupations, and the available sources. Some teachings relevant to development ideas and practices are summarized in Box 8. No attempt is made here to identify commonalities and differences, although there is scope for doing so.

## Box 8: Religious teachings and development ideas and practices: illustrative views from some faith traditions

**Islam:** Nearly a quarter of the verses of the Qur'an refer to economic issues, including trade, finance and inheritance. It is considered desirable to have sufficient to meet one's needs but not too much wealth. Wellbeing is based on the fulfilment of necessities (*dharuniyyaf*), conveniences (*hajiat*) and comforts (*kamaliat*). Five needs are specified (religion - *deen*, life - *nafs*, the mind - *aql*, progeny - *nasl*, and property - *maal*). Necessities are those things required to satisfy these at the minimum necessary for an acceptable level of living. It has been suggested that they should include the ability to adhere to the way of God and perform the five pillars of Islam; protection of life (which might include access to healthcare); means of securing food, clothing, shelter and education; and the right to earn a living, establish a family etc.

If one or more of the five needs (even the non-material needs) is unsatisfied, a person is deemed poor. There is a general preference for people to work to overcome poverty, if necessary with the assistance of the Islamic authorities, who have a duty to create opportunities if they are not available. A number of verses also specify the right of the poor to receive support and the duty of the rich to give. This is now mandatory in the form of *zakat*, meaning purification of wealth (see above). It has to be given by all Muslims at the end of each year and is calculated at a rate of 2.5 per cent of any disposable wealth above a minimum (*nisab*). Categories of beneficiaries are detailed in the Qur'an e.g. orphans, the destitute. Sunnis believe that the collection and distribution of *zakat* is one of the responsibilities of an Islamic state, potentially providing a potent tool for reducing poverty and inequality.

In addition, various forms of voluntary charitable giving are identified, including *waqf* (endowment), which is used for the construction of mosques and welfare facilities. The religious injunction to give generates considerable funds, which (apart from *waqf*) are mostly used to meet the immediate needs of individuals, although whether and how they can be used for longer term development activities continues to be debated.

Islamic economics is concerned to create a just and moral socio-economic system, so although economic growth is a prime objective, unethical business practices, waste, speculation, and gambling are prohibited. The underlying principle is the elimination of exploitation, by sharing both profits and risks between those involved in transactions. In particular, this rules out a guaranteed return on loans (prohibition of *riba*) (see Zaman, 2008, for a survey of the Islamic economics literature).

Principles and practices of governance set out in the Qur'an and Hadith have been elaborated by succeeding scholars and rulers, amongst whom views differ about whether Islamic theocracy is compatible with democracy and human rights. Some argue that Islam supports democracy, but in less individualistic form than Western democracy, based on principles such as *shura* (consultation) and *ijma* (consensus). Muslims commonly believe that all rights are God-given, so the concept of a person having rights simply by virtue of his or her humanity is unacceptable. The only rights that are recognized are those specified in Shar'ia law, which are not all compatible with the Universal Declaration of Human Rights, especially those related to freedom of religion and gender. For example, women and men are guaranteed equal dignity but not equality in other matters, such as inheritance.



**Christianity:** Drawing mainly on Biblical teaching, Christians may see personal wealth as a sign of God's blessing, or even as the reward of faith. Equally, they may regard wealth with suspicion as a sign of ill-gotten gains or self-interest. They are warned against 'mammon' or 'money' as something that easily comes between them and God, "the root of all evil", a source of temptation. However, the danger is the "love of money" (and often the gap between the rich and the poor), rather than money itself and wealth is affirmed if obtained by honest means, does not usurp the place of God, is shared and is used to good ends.

Renunciation was a recurring theme in Jesus' teaching and voluntary poverty is regarded by many Christians as a virtue. However, others regard the disposal of possessions as irresponsible and the prosperity gospel advocates the opposite. Involuntary poverty may be seen as God's will, a test or punishment. It may be regarded as an evil to be eradicated, a result of the corruption of people or society by sin, inevitable in a necessarily unequal world, or as the outcome of injustice and oppression. Compassion for those in need is stressed. Although the prevailing view is that human beings have a responsibility to work for a living, those who regard injustice as the root of poverty believe that Christians have a duty to tackle it.

Development strategies promoted and used by Christians therefore include alms giving, service delivery, promoting economic growth, campaigning for human rights and against injustice and exploitation, and advocacy on behalf of the poor. Many Evangelical churches pursue an agenda of conversion and church-planting, and engage in humanitarian work as a means to this end. They tend to be comfortable with a capitalist market economy. In contrast, since the 1960s, liberation theology has provided a biblical basis for Christian action in solidarity with the poor and challenges to capitalist models of development. Human rights are generally supported, but are related to duties, and are considered alongside other values such as truth, charity and justice, to which a concern for 'the integrity of creation' was added in the 1980s.

The 'historic' or mainstream denominations (Roman Catholic, Lutheran, Orthodox, Anglican, Reformed etc) have the most developed theologies of engagement and are most likely to participate politically (at least where they are not persecuted minorities). However Evangelicals are increasingly active in public life, and in some countries (e.g. Brazil, South Korea), newer Pentecostal churches may also be politically involved. Some movements, like liberation theology, advocate social change; others, like Pentecostalism, tend to be more accepting of the status quo.

Most Christian churches have been conservative with regard to gender, but there is a wide spectrum of views on women's status and roles and there are active Christian feminist movements. The Catholic and Orthodox churches still exclude women from their hierarchies, but more radical Reformation churches, which emphasize preaching the Word of God, and the products of revival movements, which emphasize the unmediated experience of the Spirit, such as Methodists and some Pentecostals, have recognized women's ministry from the outset. However, as with views on other issues, there is enormous variety within the Christian tradition and, because of the influence of local culture, between Christians in different locations.

**Hinduism:** The Hindu Sanskrit texts reflect a Brahmanical view of the religion, rather than the lived tradition, so the possibility of identifying a 'Hindu view' on any particular issue from the texts is both limited and unlikely to reflect how people behave. Some seek to reinterpret Hinduism to distance it from a past in which caste and gender oppression were religiously justified, while others invoke notions of an 'authentic' Hinduism from which contemporary interpretations are said to have deviated, generally to justify Hindutva, or Hindu nationalism.



*Dharma* refers to the ritual and moral duty that a person has according to his or her station in life, which is a result of their past actions (*karma*). Thus, there are unequal duties, as well as different levels of value, between different members of society, differentiated according to caste, age and gender. The caste system and the inferior position of women are deeply engrained, limiting people's life chances and opportunities for development, as well as the realization of human rights. Critics are attracted to the idea of *sadharana dharma*, which is common to all human beings and includes duties such as honesty, charity, forbearance and generosity. This, it is thought, could provide a universal and egalitarian ethic to bridge the gap between the stratified tradition of *svadharma* and secular human rights.

Hindu attitudes towards the accumulation of wealth are ambivalent: on the one hand, it is regarded as a legitimate aim for humans (*artha*, one of the four 'aims of life') and even a result of previously meritorious behaviour, but on the other it is thought to prevent people from achieving spiritual liberation (*moksha*, implying liberation from *samsara*, the cycle of rebirth, traditionally through renunciation). There have been ongoing debates about the influence of this ambivalence for economic practices. Alms giving (*dana*) and service (*seva*) to the poor are emphasized as part of the duty/*dharma* of individuals and are believed to increase their religious merit (*punya*).

Traditional understandings of women as secondary to men and as naturally destined for a domestic role are reinforced by Hinduism, which regulates the private sphere and encourages women to regard reproduction as a duty and to be submissive and dependent.

The link between religion and education in India is ancient, but was gradually overtaken by the spread of secular education. In recent years, a revival of the Guru-shishya tradition (transmission of religious knowledge from a guru to a disciple) has been accompanied by an increase in the numbers of Gurukulas teaching modern as well as religious subjects, mostly for boys. Many are concerned that this trend, which appears to be associated with the rise of the Hindu Right, is another dimension of the Hinduization of Indian society.

**African traditional religion:** In African traditional religion, belief that a particular action is right or wrong is influenced by customs and taboos, a moral consciousness perceived as integral to human beings, and a fear of mystical sanctions. Moral norms hold that individual behaviour is right or wrong according to how it affects the group, which may be the immediate household or a wider kinship group, and may include ancestral spirits as well as living members. The stability and continuity of communities is prioritized over the rights of the individual, affecting ideas about ownership of property. The ethical task is therefore to establish a balance between private ownership, the accumulation of wealth and the common good. The latter may require joint or public access to the basic resources necessary for life, such as grazing, water or woodfuel, and also impose an obligation on the wealthy and leaders to help the needy in times of adversity.

Myths, proverbs, prayers and practices reveal that women are perceived as the force of life and valued for their reproductive role, but also regarded as a source of danger (because of their sexual allure) and pollution (for example the blood associated with menstruation and childbearing). The roles allocated to women in the religious and domestic spheres are considered inferior to those of men, reinforcing their subordination.

Sources: Aलो Alhassan, 2007; Kim, 2007; Kroessin, 2008; Tomalin, 2009

An alternative approach was adopted by Noy (2009), who undertook a survey of scholars and practitioners in nine countries in the global south (three from each continent, selected to represent an array of economic, religious and political situations). Organizations were chosen to reflect maximum diversity of development interests, perspectives and positions (75 secular and 80 religious, from a variety of faith traditions) and one or two informants selected from each, resulting in 200 semi-structured interviews, mostly with individuals. Respondents were asked about their vision of development/a good society, wellbeing, the activities and strategies of their organization, ethical and spiritual dimensions of development, and the links between their own religious beliefs and development. He uses the results to identify six types of development model that inform the views and actions of development actors.

Although the thinking of many of the individuals in his study was informed by more than one vision of development, Noy found that their views cluster, making it possible to identify six ideal type approaches to development (Figure 3).

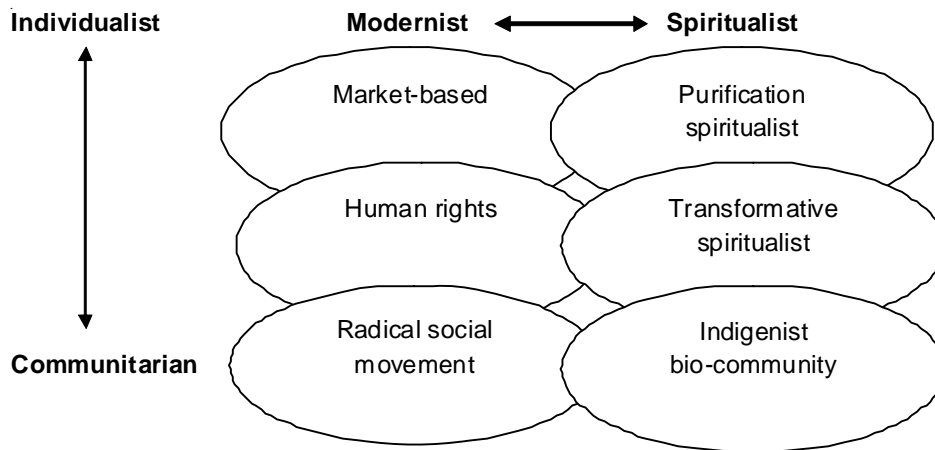
*i. Market-based:* This model is based on a market-oriented modernist vision of development. It is an approach based on

...using markets, entrepreneurship and human capital to stimulate economic growth, while also recognizing ...that some aspects of moral order in society and spiritual-ethical values such as honesty underpin the function of markets. Respondents holding this approach were found in government ministries, in regional and global development banks, amongst business associations and in NGOS, such as local micro-credit agencies (Noy, 2009, p 290).

*ii. Purification spiritual:* This approach to development is associated with individual spirituality.

It emphasizes the role of individual purity, religious morality and individual religious adherence as key to developing a good society. Additionally, within this approach, charity to help the poor succeed within the economy is ... seen as an important aspect of development. .... Religious professionals and representatives of religiously based charity, health or educational organizations frequently held this approach. [However it] is not limited to any particular religion, but rather is a way of understanding religion and the relationship between religion and social progress that was held by particular respondents across religions. A large number of Buddhist, Sikh, Hindu, Muslim and Christian respondents all expressed the belief that individual purity, religious morality and individual religious adherence played a key role in the development of society. This does not mean that they did not also draw from other developmental ideal types or see other factors of development, only that they saw spiritual purification and its promotion as a key aspect of development – just as important or even more so, than economic growth or material progress (Noy, 2009, p 291).

**Figure 3: Types of development approach advocated by international secular and religious development actors**



Source: Adapted from Noy, 2009, p 295.

**iii. Human rights:** This approach is modernist and market-oriented, but recognizes that reliance on the market will produce inequality and poverty and is influenced by some religious values.

It recognizes the importance of markets and market participation in generating wealth for individuals, while also seeking to insure that a minimum standard of distribution of wealth, health care, education, and other human rights is guaranteed by the state. At the core of the human rights perspective is a dual belief in the importance of legal frameworks for human rights, as well as the empowerment of citizens to claim those rights from the state. Interview respondents working within United Nations agencies, as well as across government agencies and NGO's broadly held on to this approach (Noy, 2009, p 291).

**iv. Transformative spiritual:** This approach is mainly based on religious values, although it recognizes that personal transformation is unlikely to be sufficient and that attention is also needed to meeting practical welfare needs.

Within this approach, development involves the creation of a new, evolved human order based on spiritual principles of unity, justice, expansion of consciousness and moderation of human consumption. The key to this development is spiritual transformation, either purely internally or combined with social action. Respondents holding this approach could be found largely within religiously or spiritually based social movement organizations and amongst highly politicized religious professionals. Progressive activist religious movements, such as engaged Buddhism, Liberation Theology Catholicism and organizations based in Gandhian philosophy, held this transformative spiritualist vision (Noy, 2009, p 292).

v. **Radical social movement**: inspired by the vision of a society in which the interconnections between humanity, ecology and culture are recognized,

This approach was adhered to in various ways by respondents representing different social movement organizations, by anti-globalization activists, by revolutionary insurgent organizations and finally, by some representatives of socialist government agencies in Venezuela. Similar to the Human Rights approach, the Radical Social Movement approach generally sees guaranteeing universal human rights, especially economic rights, as a key to development. However, the Radical Social Movement approach is distinct from the Human Rights approach in its particular emphasis on mobilizing social movements and political struggle by the poor against elites, corporations and capitalism as the key to development. (Noy, 2009, p 293)

vi. **Indigenist bio-community**: inspired by a similar vision of society to the radical social movement vision of development,

...this approach emphasizes the interconnection between humanity and nature and envisions the creation of alternative, sustainable communities as the future of humanity. This approach was found amongst representatives of indigenous people's organizations, amongst some religious professionals who came from or worked in indigenous communities and amongst representatives of the 'global eco-community' movement. An important point for many of the respondents holding this view was a rejection of the Western materialist model of development (Noy, 2009, p 294).

Noy terms these development models 'ideal types', to signify that there is variation within each category as well as links and overlaps between them. He notes that some types of scholars and practitioners (religious and other) have visions of development far removed from the post-Washington consensus mainstream e.g. with a strong emphasis on normative, spiritual and philosophical questions about the nature of human reality and the meaning of human (societal and individual) progress and transformation, suggesting that there is too little recognition of this in mainstream development policy and practice.

In addition, while some actors (religious and other) are associated with some visions and approaches more strongly than others, he emphasizes that there is no clear dividing line between 'religious' and 'secular' visions and approaches. Only the first development model is purely secular and materialist, while the fourth focuses largely on ethical, religious and spiritual dimensions of development. However, the others do not map tidily on to one side or another of a religious/secular divide. Instead, they draw on ideas from both, seeing religious values and practice as providing the ethical basis for secular

development activities, and using material approaches to achieve development even when inspired by religious motivations. Noy therefore suggests that

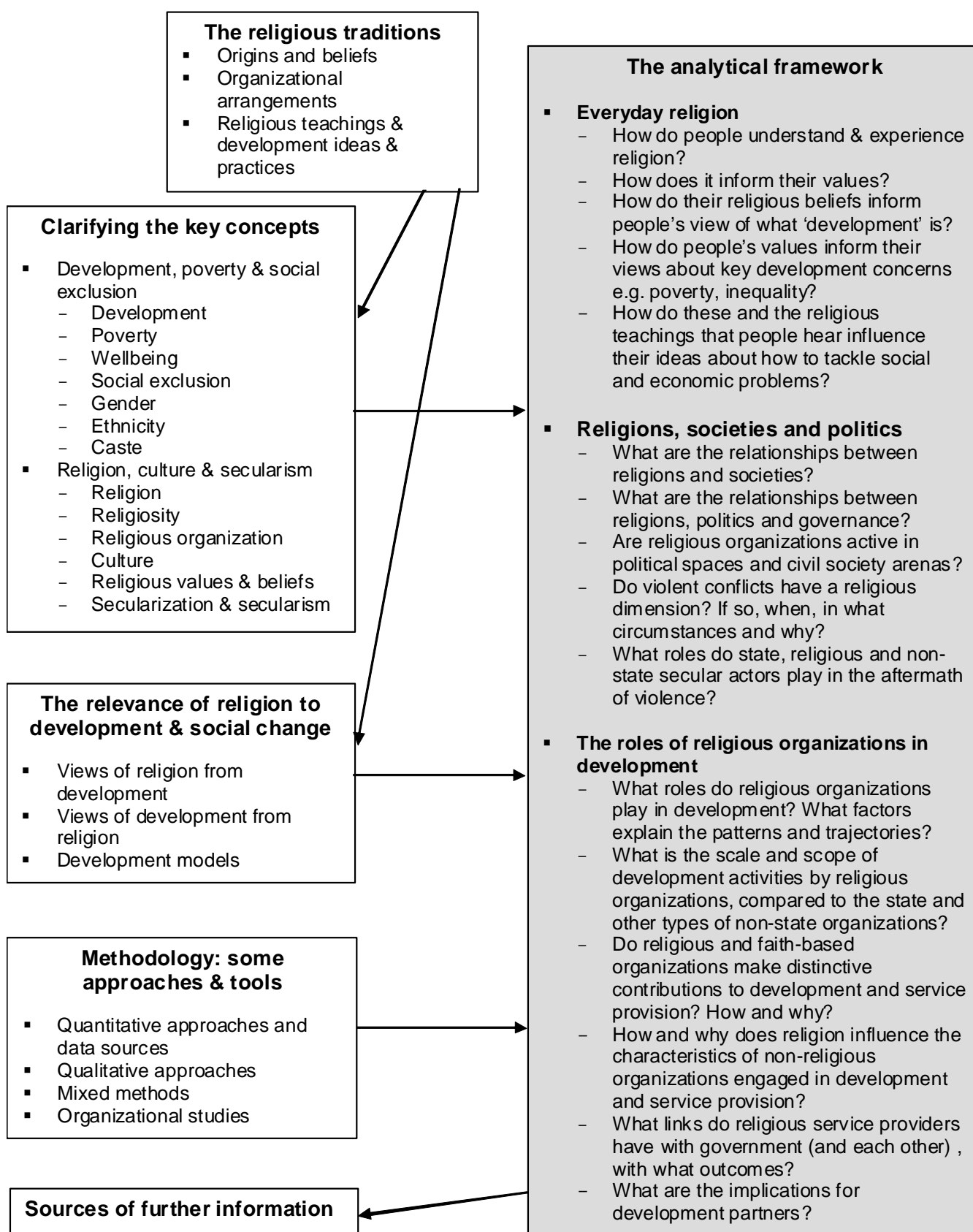
...specific religious adherence is not the only or even most important category by which to categorize different development visions across the world. Also [he notes that the] views of individuals within a religious tradition often had more in common with members of other traditions than other members of their own: How these respondents interpreted and employed the symbols and doctrines of their religion in relation to questions of development and social change strategies was often more important than the specific doctrine or religious identity to which they adhered (Noy, 2009, p 301).

In the end, he concludes, where people stand on the liberal/conservative spectrum within a religious tradition seems to be a more important distinguishing factor in their views about development than religion or denomination.

When trying to understand 'religion', 'development' and interactions between them, those involved must be aware that, as noted in Section 2, ideas about the nature of knowledge, the use of theory and the role of empirical analysis vary both between disciplines and between the global faith traditions. Much of the writing on religious values and beliefs (and also the teaching that informs religious people and the activities of religious organizations) focuses on principles and their interpretation (the world as it should be) rather than the study of lived religion. It is often associated with the view that, if more development activities are handled by organizations with a religious motivation and/or institutional roots in a religion, then development objectives would be achieved more successfully. It can sometimes lead to the adoption of an instrumental view of religion as something that can be used selectively to advance development objectives. Some (though not all) of the work in this tradition that is produced by theologians and other 'insider' interpreters of a religion relates to ideal rather than actual lives and societies. Clearly awareness of the values, beliefs and moral codes of the religious traditions present in any development context is necessary, but an understanding of lived religion is as, if not more, important for development actors.

Sometimes the ability of outsiders to understand a religious tradition (or culture) is questioned. Undoubtedly, many outsiders (foreigners, non-local nationals or those associated with a different religion) are both unaware of the implicit assumptions they bring with them from their own religious and cultural tradition and ignorant of other traditions – awareness of the former and a basic literacy in the religious and cultural traditions of the contexts in which they are working are both vital.

## Figure 1: A guide to analyzing the relationships between religion and development





## 4 The analytical framework

An analytical framework for developing a rounded understanding of the links between religion and development has three dimensions:

- a personal dimension that seeks to understand what religion means to individuals and how it informs their views, motivations and actions
- a social dimension concerned with the ways in which religion interacts with social and political processes
- an organizational dimension that focuses on the nature, aims and activities of religious organizations

While each needs to be understood, and the methodological approaches to assembling and analysing evidence may be different for each, none can be understood in isolation. For example, do people's religious beliefs and values influence their participation in wider social movements or political processes? Do people's beliefs lead them to join religious political parties and do such parties polarize political participation along religious (sectarian or denominational) lines? Do the beliefs of supporters of faith-based organizations differ from those who support secular non-governmental organizations pursuing similar development objectives, with what effects on the nature and activities of the organizations? Do organizations associated with different religious traditions have distinctive characteristics because the traditions have different beliefs and are organized in different ways?

Questions that may be helpful to guide the analysis are suggested below, with some illustrations from research conducted during the Religions and Development programme. They are a starting point, rather than exhaustive or appropriate for every situation. For example, they do not consider economic and livelihood issues in any depth, nor do they consider whether and how religious beliefs and organizations play a role in the management of natural resources and environmental sustainability.

The summaries draw mainly on published working papers, full details of which are given in the references, with the relevant links to the programme's website. The summaries only refer to selected studies – a full set of the published outputs from research undertaken in the programme's focus countries (Nigeria, Tanzania, India, Pakistan) is available on the website.

As noted in Section 1, this is a guide to analysis rather than a full theoretical framework for understanding the relationships between religion and development. The authors of the studies summarized in the boxes do attempt to explain *why* interactions between religion and development

take specific forms and have particular outcomes, but more work is needed, first, to examine whether the links identified in this research, which related to specific countries and localities and selected religions, and was often based on a limited number of case studies, are more widely applicable, and second, to develop more general theoretical insights from the work undertaken.

Nor does this guide include consideration of how to identify the policy and practice implications of research findings – in our view, this is best done by dialogue between researchers and other development actors. In some cases, it was possible to have such a dialogue, and the outcomes are reflected in a number of policy briefs based on the studies conducted during the Religions and Development Research Programme <http://www.religionsanddevelopment.org/index.php?section=54>. However, this guide focuses on the prior step: developing a good understanding of everyday lived religion; the links between religious adherents, leaders and organizations and social and political processes; and ways that religion is manifest in the characteristics and activities of various types of organization.

## 4.1 Everyday religion

1. How do people understand religion? How do they experience it?
2. How does it inform their values (and through what channels for socialization and learning)?
3. How do their religious beliefs inform people's view of what 'development' is (and how important are they compared to other influences e.g. politicians' statements or their experience of development policies and programmes)?
4. How do people's values inform their views about some key development concerns and principles: poverty, wealth, right social ordering, wellbeing, gender roles and relationships (e.g. gender, equality/inequality, social exclusion, welfare)?
5. How do these views and the religious teachings that people hear in turn influence their views about how to tackle social and economic problems, such as poverty and inequality? This enquiry could focus on selected issues e.g. access to education for boys and girls, tackling poverty and meeting welfare needs (raising questions about ideas of social justice and charity) and development tools (e.g. microfinance).



Findings from a variety of research projects in India and Bangladesh throw light on many of the above questions in the South Asian context (Boxes 9-13).

First, findings from research in India and Bangladesh show that religion is important in the ways that people think about wellbeing (Box 9) because of its role in the moral order, people's identity and how life should be lived. However, the research in South Asia, where caste is a significant source of social stratification and majority/minority status important in determining social position and access to resources, also warns that what appears to be about religion may be about another social phenomenon.

Ethnographic research in Pune's slums compared the religious outlook of poor Hindus and Muslims (Box 10), indicating how it assists people with their everyday lives and struggles to overcome exclusion. There are some marked differences between the religious outlook of these respondents and middle class Hindus associated with various prominent Hindu organizations in Pune (Box 11), demonstrating the importance of analyzing class and caste alongside religion.

Values and beliefs are an important influence on people's priorities and responses to government policies and programmes. Gender equality is both an end in itself and a means of achieving other development objectives, such as improved health. Particular emphasis is placed on the contribution of women's knowledge to the achievement of several of the Millenium Development Goals, including reduced maternal and infant mortality, and so to addressing girls' educational disadvantage. However, achieving gender parity in school attendance and achievement has proved difficult and sometimes parents' resistance to sending their daughters to school has been attributed to their religious beliefs. Research in Pakistan confirmed some common perceptions about Muslims' attitudes towards education for girls, but also identified differences between men and women and between more conservative and more liberal Muslims (Box 12).

It is also believed that people derive moral codes by which to live from their religion. The inverse relationship between levels of corruption and religiosity is therefore a puzzle. Research on people's attitudes to corruption in India revealed a complex picture: not only is there no straightforward link between ethics and behaviour, attitudes are shaped by many factors and trends in addition to religion, and many religious leaders and organizations appear to have lost their moral standing in recent years (Box 13).

## Box 9: Religion, development and wellbeing

Research in India and Bangladesh shows that religion is highly significant in the ways that people think about wellbeing. However, the understanding of religion that is generally invoked is rather different from the set apart area of life imagined by modernity. It appears as the ground of a wider moral order, which goes beyond any particular 'religion'. Religion is about conduct, character and core virtues, rather than spiritual belief.

Particular attention was paid to how people use the word most commonly translated as religion, *dharma*. The research found that this was sometimes used in the ways most commonly assumed in the literature: to refer to a particular community identity (Muslim, Hindu, Christian and so forth); to specific practices (prayer, puja, fasting, charitable giving), beliefs and values; and to draw on particular texts or bodies of teaching. In addition, however, and more generally, the research found that *dharma* was used to refer to a sense of underlying moral order, the 'order of things': the allocation of authority between older and younger, husband and wife; community cohesion or social fragmentation. Statements such as the following quote from an Indian respondent convey this, neatly capturing the play between religion as a form of social identity ('whether one is Hindu or Muslim or Christian') and religion as embodied experience ('what we do, the acts we perform'):

*Religion is the life that a person lives or the path that they walk from the time they are born till the time that they die. Whether one is Hindu or Muslim or Christian is not of significance since there is just one God. It is true that there are different religions but that is not what constitutes faith. Faith or religion is what we do, the acts that we perform, telling the truth and doing our duty; that is religion (White et al, 2011, p 3).*

Even in religiously homogeneous localities, caste divisions were clearly in evidence. The community profiles showed religion and caste structure the organization of space, with different communities living in different streets or neighbourhoods: higher caste dominant religious groups are physically more central, while others are located geographically as well as socially on the margins. Differences are also visually evident in the quality of housing, and in access to basic services.

Nevertheless, "in taking any topic as a subject of study there is a danger of exaggerating its importance. This is perhaps a particular danger with religion. While everyone says religion is important, it is important to note that many also admit that they do not have time to practise. It is also easy to attribute to religion something that is actually due to another factor" (White et al, 2011, p 48). In the Indian study, for example, analyses of the quantitative survey data drew attention to differences between locations (different levels of prosperity and service availability in Punjab and Orissa, and between urban and rural locations) and castes, which seem to account for at least some of the differences in wellbeing that appeared at first to be due to religion.

Sources: Devine and White, 2010; White, 2010; White et al, 2011.

## Box 10: Religion in the lives of slum dwellers in Pune, India

Short term ethnographic research in two slum settlements in Pune, Maharashtra, sought to understand the values and beliefs that influence and shape people's lives, in terms of how they see the world and negotiate their place in it. The research focused on poor, low caste Hindu and Buddhist communities in two typical slum settlements.

It revealed that religion

- influences people's understanding of their society and their place in it, in particular their diagnosis of why they are poor and discriminated against: both Hindus and Buddhists see the world through a caste lens and agree that they are discriminated against because of their low caste status.
- informs people's shared basic ideas of *karma* and *dharma* (roughly translated as destiny and duty)
- provides practical resources for dealing with day-to-day difficulties, including spiritual solace, advice from local religious leaders, and access to material resources and political platforms offered by slum-based religious organizations.
- influences people's responses to their current disadvantaged situation, with some accepting the status quo and pursuing a better next life through religious practices and good behaviour, and others seeking to improve their wellbeing and prosperity in this life
- is linked with the emergence of gurus (such as Ambedkar for Buddhists) and nationalist organizations (such as Shiv Sena for Hindus) who articulate people's experience of caste injustice
- motivates people to pursue visions of how they think the world should be and provides them with possible strategies for achieving improved personal circumstances and a more equal society.
- supports the constant reshaping of identity, personhood and agency.

Source: Bradley and Ramsay, 2011

## Box 11: Spirituality, gender and class: devotion, discourse and ideology in three Hindu organizations

The religious discourses of three large trans-national Hindu organizations based in Pune, Maharashtra were studied: The Ramakrishna Mission, The Sadhu Vaswani Mission and Guru Mata Amritanandamayi Mission. The research found that although each has a central spiritual message, each also pursues a less obvious vision of the world shaped by politics and gender. The discourse of all three organizations uses broad religious concepts such as love and compassion projected through images of women as mothers. The gendered ideologies pursued by each organization are also politicized, in that they entail a vision of how India and the world should be. Despite the outward pursuit of similar spiritual goals, the political objectives of the organizations differ, revealing three competing visions of the world.

The Ramakrishna and Sadhu Vaswani Missions have a patriarchal vision, with clear distinctions between the domestic, private responsibilities of women and the public decision-making roles of men. Although they refer to the 'empowerment' of women, this means something very different from its use in the development or feminist literature: it refers to enabling women to fulfil their roles as mothers and to withstand the pressures of a modern secular life.

- Sadhu Vaswani urged women to prioritize mothering and nurture the next generation of Hindu nationalists, who will fight for a unified India. The education of girls is the means through which he hoped to achieve his vision of India, based on his central teaching: 'educate a woman and you educate a whole nation'.
- The Ramakrishna Mission's politicized vision is one that wishes to retain a patriarchal and caste-based stability in which each Hindu knows and understands their place in the world. This status quo preserves the privilege of high caste men, despite the stress the organization publicly gives to its charitable work with the poor.
- Although Guru Mata Amritanandamayi does not describe herself as feminist, her gender ideology separates women as biological mothers from the socio-cultural role of mothering. She advocates equality between the sexes, arguing that women should be free to make their own decisions about their life paths and should not be under the control of men, specifically their husbands. In addition, she advocates that men must strive to enact the compassion women naturally feel when they embrace mothering. Although not directly expressed as a challenge to patriarchy, therefore, Guru Amritanandamayi presents an alternative to the visions of the other missions.

In each case education is an important dimension to the missions' work. It helps them to secure the next generation of devotees and raise money for their operations. Their views about the role of women in the family and society and their visions of a Hindu India strongly influence the curriculum in their educational institutions, ensuring that their Gurus' teachings continue to influence Hindus' view of the world.

As part of their spiritual journeys, devotees are expected to give *seva* (service), incorporating both devotion to God and service to those less fortunate. For all three organizations, *seva* is central. However, their welfare work, which takes the form of providing assistance (often food) to poor people, is essentially a tool by which their largely middle class devotees can enhance their personal spiritual growth. While such charity does contribute towards fulfilling the basic needs of some of Pune's poor, it does not provided them with long-term opportunities or challenge the

status quo. Even for Guru Amritanandamayi, for whom social welfare activities demonstrate how the value of compassion can be translated into practice, someone who is poorer is needed as a focus for that compassion.

The organizations studied here attract large Indian and transnational followings drawn to a spiritual life founded on love and compassion. However, the spiritual and political are so deeply embedded in the philosophy and activities of each that without knowingly consenting, many devotees are helping to advance the political vision of their guru. Despite Guru Amritanandamayi's promotion of gender equality, none address the structural causes of poverty or challenge the caste system.

Source: Bradley, forthcoming

## **Box 12: Muslim attitudes to women's education in Pakistan**

Religious beliefs and values regarding women's education, the manner in which these are interpreted by religious leaders, and the extent to which they are internalized or resisted by followers were studied in Lahore and Peshawar. Leaders and teachers of seven Shi'ite and Sunni organizations in Lahore and three in Peshawar were interviewed to find out how they interpret religious messages and injunctions on women's education. Subsequently, followers and students of the same organizations were interviewed to explore the extent to which they internalize or reject the teachings of leaders and teachers. Finally, some members of civil society who are either avowedly secular, or whose work is not specifically linked to religion, including academics, feminists, teachers and development practitioners, were interviewed to see whether and how their views on women's education differ from those of people associated with religious organizations.

Both religious and secular respondents support women's education, but for different reasons. Contrary to the initial expectations of the researchers, leaders and teachers, as well as followers, of all the religious organizations studied, even the most conservative, expressed strong support for women's education. Many said that gaining knowledge is an essential duty of all Muslims, men and women. However, the reasons given for educating women varied considerably, ranging from the idea that education is a basic need and a woman's right to the view that educated women nurture an educated nation, with educated women making better mothers and wives. The latter view was by no means confined to religious men, but was also expressed by some secular respondents and women.

However, views about the kind of education that is desirable for boys and girls differ along both religious/secular and gender lines. An overwhelming majority of religious teachers and members of religious organizations supported education for girls on condition that the curriculum is controlled and that religious education is included along with worldly subjects. A substantial number of those interviewed stressed differences between men and women that must be taken

into account. Arguments based on the gender division of labour and separate spheres recur in most men's responses. Typical was the following statement by a man from the Jamaat-e-Islami: "*Allah has made man the breadwinner and woman is the weaker sex.*"

Most of those who mentioned that there are 'natural' differences between men and women supported medicine and teaching as respectable subjects for women. For example, a man belonging to the Jamaat-ud-Daa'wa said the following:

*All kinds of education are permitted. There should be some difference because women have their own departments. A woman has her own skills and her own nature. She should specialize in the work that she is required to do. She should not be made to study things that are used in work she won't do. A woman can be a good doctor, nurse or teacher and should be trained in these areas.*

The reasoning was that women doctors and teachers are needed to attend to female patients and impart instruction to girl students. However, most men (and women associated with more conservative religious organizations) considered education for certain other professions inappropriate for women. For example, it was considered distasteful that they should become drivers, engineers or industrial workers, where they might have to work with men. A number of male respondents emphasized that women should receive education in home economics and the domestic sciences, while none of the female respondents suggested this. Instead, most women (and all the secular respondents) believe that boys and girls should be able to study the same subjects, with religious women quoting historical examples to support their case:

*If we go through Islamic history we'll find a lot of examples of women contesting the rulers of their time, fighting wars, helping wounded soldiers in battle, trading along with men independently or as partners.*

Religious and secular respondents have opposing views on the issue of segregated versus co-education, with the former staunchly opposed to co-education and the latter generally in favour of it. Especially in more conservative Peshawar, co-education seemed to elicit a great deal of anxiety around the potential for violation of moral norms, the loss of purity and piety, and the decay of family values. The opposition to co-education seems to be strongest among Sunni (especially Deobandi) men. However, another reason for supporting sex segregated education offered by many female religious respondents was that girls perform better in single sex institutions. Secular respondents generally oppose educational sex segregation, except when the aim is to enable girls to receive an education in a non-threatening environment.

Source: Saigol, 2010.



## Box 13: Religion, ethics and attitudes to corruption in India

In countries where religion plays a central role in people's lives, it is expected that many, including public servants, will derive their moral and ethical values from their religion. Religion does indeed provide many with a language of ethics and, often, an actual 'list' of rules by which to live, some of which may be relevant to fighting corruption. Problematically, however, many of the world's most corrupt countries also rank highly in terms of levels of religiosity, suggesting that the relationships between widespread religious adherence and levels of corruption are not straightforward. Attempts to reduce corruption have had limited success, leading to a renewed interest in the role that religious values might play in future initiatives.

This study assembled a picture of people's religious beliefs, values, perceptions of corruption, and notions of tradition and modernity, based on 120 semi-structured interviews with representatives from a variety of social groups, including the government, academia, the corporate world, development organizations, the media, youth and religious associations, mainly in Andhra Pradesh and Punjab. The interviews explored questions such as:

- What does it mean to be religious?
- How are people's attitudes towards corruption influenced by their religious beliefs?
- How do perceptions of modernity and tradition intersect with religion and corruption?

The research also examined how Hindu and Sikh religious leaders and organizations are perceived, to determine whether they might play a role in anti-corruption efforts.

Some of the key findings are:

- Religion is universally believed to be an essential part of life for Indian people, but its importance varies between individuals and the ways in which people understand and justify their religiosity differ. A distinction is made between ritual practices and the living out of religious tenets in everyday lives, with many believing that overt religiosity does not necessarily signify that a person is 'truly religious'.
- Although religion is seen as important for how people construct value systems, these are subject to myriad influences. The family is said to play much the most important role in developing values. However, the personal, professional or socio-political environment in which a person finds him or herself exerts a strong influence, and often in practice there are contradictions between personal and professional moral codes.
- Some argue that certain religious ideas may encourage tolerance of corruption, for example, *karma* – the attribution of a person's position and fortunes in this life to actions in previous lives. In addition, some are said to 'bribe God' by donating the proceeds of corruption to religious organizations. Religious leaders no longer seem to have moral influence.
- There is little agreement about what constitutes corruption. Some favour narrow/legalistic definitions, including acts such as bribery, misuse of office and misappropriation of public funds and donations. Others advocate broad/moralistic definitions, which view a large number of acts as corrupt, including gift-giving/'tipping', nepotism and womanizing.

- Corruption is generally blamed on greed, materialism, the desire to succeed, cumbersome bureaucracy, administrative loopholes, and failure to implement rules and laws.
- Tradition is not itself seen as promoting a 'culture of corruption' and so cannot be regarded as an obstacle to anti-corruption work. Indeed, in India, most consider that modernity, secularization and consumerism have contributed to the erosion of tradition, and so are responsible for the perceived worsening of corruption.
- Many are not comfortable with a binary distinction between tradition and modernity, regarding themselves as both traditional and modern.
- Corruption continues to thrive, unchallenged by religion, partly because factors other than religious values and practices influence people's attitudes and behaviour and partly because religious leaders and organizations have been discredited in the eyes of many. However, some believe that religion-based morals and narratives could contribute to curbing corruption and creating an environment in which honesty, integrity and hard work are rewarded and celebrated.

Source: Pavarala and Malik, 2011.

## 4.2 Religions, societies and politics

1. What are the relationships between religions and societies?
  - a. How do religious institutions influence culture, social norms and the relations between social groups?
  - b. Do religious norms and actors support or impede social harmony, equality and justice?
  - c. In what ways and through what institutions and processes?
2. What are the relationships between religions, politics and governance?
  - a. What roles do religious actors play in formal and informal political processes, with what effects?
  - b. How do religious groups advance their own interests in the political system, with what outcomes?
  - c. What are the religious dimensions of international relations and how do these affect domestic politics and governance?
  - d. What implications do the links between politics and religion have for law and policy?
3. Are religious organizations active in political spaces and civil society arenas? For example, to what extent have they participated in policy consultation processes, why, and with what outcomes?
4. How have movements for social change engaged with religious ideas and organizations?



5. Do violent conflicts have a religious dimension? If so, when, in what circumstances and why?
  - a. How and why do instigators draw on religious difference or organizations in the perpetration or justification of violence?
  - b. What explains the occurrence, characteristics and outcomes of inter- or intra-religious violence?
  - c. What roles do state, religious and non-state secular actors play in the immediate and longer term aftermath of violence (the restoration of order, reconstruction, prevention of further violence etc)?

Based on research in Nigeria, Tanzania, India and Pakistan, a broad understanding of post-independence and contemporary links between religion, politics and governance has been developed and is summarized in Box 14. Other research investigated various aspects of these relationships in more detail: participation by religious organizations in policy consultation processes, the role of religious organizations in campaigns for legal reforms to realize women's rights, and the roots and aftermath of inter-religious conflict.

Research and pilot projects to build the capacity of religious organizations to participate in the preparation and review of Poverty Reduction Strategy Papers in Nigeria and Tanzania are described in Box 15. The engagement of women's movements in Nigeria and India with religious actors and their role in blocking or supporting campaigns for legal reforms to realize women's rights in Nigeria and India are summarized in Boxes 16 and 17. The roles played by various actors in inter-religious conflict and its aftermath in the cities of Ahmedabad and Mumbai in India are examined in Box 18, with a focus on government agencies and religious organizations. The research shows, for example, that

- religious actors interact with others in complex and often contradictory ways
- religion is often embedded in struggles for political advantage and may be used instrumentally by political actors
- religious actors may oppose some social changes considered desirable by development actors but support others
- religious actors' engagement with social and political processes is influenced by power inequalities and struggles between and within religious bodies.

## Box 14: Religion, politics and governance

Case studies of religious actors engaged in contemporary politics in India, Pakistan, Nigeria and Tanzania provide some fascinating insights into the changing nature of governance in these countries and also the transformations which are occurring within the religious traditions.

In the constitutions of most newly independent countries, religion and the state were separated. However, since then, state secularism has declined. In states that wish to remain secular (non-religious or even-handed towards all religions), conflicts between state and religious actors have increased. In contrast, in some states, religion has been integrated into the state. The pressures are reflected in the electoral mobilization of religious identities; state co-option of religion; resistance by marginalized groups using religion as a resource; and, post-9/11, new discourses and policy innovations centred on religious identities. Historically, the 'crisis of governance' in these states from the late 1970s onwards has played a critical role in undermining the coalition of social and political forces that underpinned the post-colonial secular state, in the process creating new public spaces for religious actors to occupy.

The case studies show that

- Democracy, even in religiously homogenous societies such as Pakistan, operates to undercut the power of religion and religious actors. Conversely, lack of democracy (e.g. under military regimes) encourages the use of religion as a means of exercising power, increases pressure for greater integration of religion and the state, leads to the use of religious actors by the state to increase its legitimacy and sets up a vicious cycle of radicalization.
- The interests of poor religious communities are more likely to be articulated if there are incentives for political parties to do so (such as increasing their electoral support base) and programmes intended to benefit these groups (e.g. affirmative action). Engagement with the political process by such communities can lead to changes in their sense of identity as well as their access to resources.
- Religious actors have an ambiguous record with respect to good governance and development. While most criticize *underdevelopment*, their ideas about the meaning and purpose of development diverge widely. Some are enthusiastic about the 'good governance' agenda, while others put forward alternative conceptions of development that foreground religious ideals and practices. However, some religious beliefs accept and reinforce gender discrimination, religious discrimination and/or the disempowerment and exclusion of the poor.
- Encounters between the state and religion in the countries studied are exposed to non-religious as well as religious influences and so are dynamic and changeable. For example, the 'good governance' agenda in Africa and Asia has impelled states to be more accommodating of cultural and religious diversity and gender equality, sometimes at the behest of external agencies. In addition, some informal mechanisms for treating faiths even-handedly with respect to access to political and bureaucratic office have had positive results, and some attempts to initiate inter-faith dialogue are promising.

Overall, however, such examples and experiences are marginal to the main debates about the state and religion in the countries under study. Their limited impact demonstrates how challenging it is for religious actors in Asia and Africa to be drivers of good governance and development. Rather than focusing on the role and performance of religious actors per se, therefore, a better understanding is needed of various actors' engagement with and influence on the nature and outcomes of general policies to improve governance.

Source: Singh, 2011.

## **Box 15: Strengthening the voice of the poor: faith-based organizations' engagement in policy consultation processes in Nigeria and Tanzania**

The national Poverty Reduction Strategy Paper that has to be prepared in order to qualify for debt relief under the Highly Indebted Poor Countries initiative is expected to be 'locally owned', implying that its preparation is country-driven and participatory. PRSP processes are now well established in many countries. Even though there is much scepticism about them, in some countries the ongoing process of PRSP monitoring and review has widened the political space for deliberation and the scope for poor people (or civil society organizations that purport to represent their views) to influence policy and resource allocation.

Despite their organizational strength, legitimacy and grassroots membership, religious organizations in Tanzania and Nigeria have been little involved in policy consultation processes, such as those that occur during the preparation and review of PRSPs. Semi-structured interviews with key informants from religious and other civil society organizations and relevant government departments identified the main reasons for their lack of involvement. These included:

- the lack of good opportunities for general civil society participation in such processes, especially in the early stages and especially in Nigeria
- the often uneasy relationships between governments and religious organizations – engagement by the latter in politics is suspect, they do not speak with a united voice, the competition between them is divisive, and their attitudes to government are perceived as being critical rather than constructive.
- religious organizations' lack of resources (skills, money, time, equipment) and capacity to collect the experiences and opinions of poor communities and represent them to government in a way that commands respect.

Pilot projects carried out by the RaD programme with networks of religious organizations in Nigeria and Tanzania set out to test whether these obstacles could be overcome, by supporting collaboration between Muslim and Christian organizations. The projects aimed to develop and test 'models' for cooperation between religious organizations to systematically assemble data and analyze it. They provided operational funds, training for staff members and mentoring.

The pilots demonstrated that

- Faith-based organizations can cooperate across religious and denominational divides to assemble data at the grassroots on issues central to PRSPs (and their successors), analyze findings and present them to government at appropriate entry points. However, the submission appears to have been more influential in Tanzania than Nigeria, where there have been political upheavals and a stalled policy process. In addition, relations between religious organizations and the state are more sensitive and government interest in participatory processes is more limited in Nigeria.

- In both countries, the local management arrangements worked reasonably well, data on selected issues were assembled and analyzed, and reports were prepared and submitted to government. However, existing capacity was limited and the pilots alone were insufficient to overcome all the constraints:
  - Some local providers of training and support had weaknesses
  - Although the submissions do appear to reflect the perspectives of ‘the poor’ in the selected locations (in addition to those of local leaders), care needs to be taken in future to clarify informants’ understanding of categories such as ‘ordinary people’ and ‘the poor’ and to distinguish between informants with different social characteristics when analyzing their views.
  - In addition, the willingness and ability of religious organizations to represent the voices of the poor depend on power relationships within such organizations and between faith communities and the state, which must be subject to critical examination.  
Insufficient time has elapsed to fully assess the extent to which submissions have been followed up by the participating organizations and have influenced policy.

The pilot projects indicate that similar approaches to those tested could, with appropriate support, be rolled out more widely and sustained, if the necessary financial resources can be obtained. However, it may be more appropriate in some circumstances for religious organizations to work with other civil society organizations, rather than being singled out for support.

Source: Taylor, 2011.

## Box 16: Religion, women's movements and legal reform in Nigeria

Two campaigns for legal reform, one of which ended in failure and one in success, were studied to identify the ways in which each had engaged with religion and assess whether and how this engagement explained the different outcomes:

- domestication of the UN Convention for the Elimination of all forms of Discrimination Against Women (CEDAW) in Federal law, which resulted in the bill being defeated in the National Assembly in 2007
- legislation to prohibit discriminatory practices related to widowhood in Anambra State, which resulted in the *Anambra State Malpractices against Widows and Widowers (Prohibition) Law No. 2005* being passed by the State Assembly.

The case studies were based on documentary evidence and semi-structured interviews with individuals from secular and religious non-governmental organizations, religious leaders and government representatives.

The women's coalition for the domestication of CEDAW, which took the campaign lead, consists of a loose network of over fifty secular and faith-based organizations and networks based in different parts of the country. It emerged that:

- The CEDAW coalition had underestimated the extent to which religious actors would regard aspects of CEDAW as controversial, as well as their capacity to mobilize opposition. Few attempts were made by coalition members to investigate the views of faith communities and engage with them.
- Lobbying focused on members of the House of Assembly, fewer efforts were made to garner support among religious and traditional leaders or. As a result, the religious leaders interviewed, including those who had opposed the Bill, were often unaware of the specific content of CEDAW.
- Although faith-based women's organizations were consulted by the Federal Ministry of Women Affairs, the coalition's failure to enlist them as allies was a tactical error.
- Muslim and Christian leaders and FBO activists interviewed support the principle of women's rights, but some (and many members of the overwhelmingly male National Assembly) expressed strong reservations about the concept of 'gender equality', although it is difficult to disentangle opposition on religious grounds from men's fear of a threat to their dominant roles in the family and society.
- Christians and Muslims have similar views on some aspects of CEDAW, but not others.
- Opposition focused on specific issues relating to women's roles in the family and society, women's rights in marriage and its dissolution, and reproductive rights. Many regarded the bill as anti-family, anti-God, part of a Western feminist agenda and, especially Catholics, as an attempt to surreptitiously legalize abortion.
- Despite the failure of the Bill, the campaign is ongoing. Some religious leaders and FBOs have identified scriptural references to use in campaigning, arguing that unlike traditional culture, Christianity and Islam recognize women's rights.

Many of the rituals and practices with which widows in largely Igbo Anambra State have traditionally been expected to comply are both incompatible with Nigeria's 1999 Constitution and today regarded as inhumane and degrading. Widows are also discriminated against by Igbo

inheritance rules, which prescribe that property is inherited through the male line. Many of the rituals and practices are associated with traditional religious beliefs. They and the inheritance rules are enforced by the male and female relatives of the deceased man, sometimes quite brutally. They can reduce widows and their children to destitution.

The campaign for legal reform in Anambra State supported the introduction of a law to prevent the maltreatment of widows. Although religion is often implicated in gender inequality and discrimination against women, religious leaders and organizations played key roles in this campaign.

- Protests against widowhood practices started in the late 1980s but were uncoordinated. In the 2000s, the campaign for legal reform was spearheaded by CENGOS (Coalition of Eastern NGOs), an umbrella organization of over 100 NGOs in the nine states of the old Eastern Region, including Anambra. The assistance of professional associations of women lawyers and journalists and religious organizations was vital. Growing concern over the maltreatment of widows, including their own members, by Catholic and Anglican women's organizations in this majority Christian state led to them becoming involved with the campaign. The initiative was taken by the Catholic Women's Organization, which brought in the Mothers' Union and the Women's Guild, both associated with the Anglican Communion.
- They initiated and led on the community level campaign, seeking to obtain support from both their own members and religious and traditional leaders, especially men. The campaign was justified using religious language and beliefs, for example, the incompatibility between traditional and Christian funeral rites. Community level support increased the legitimacy of the State level campaign and led to local pressure for changes in practices.
- Although secular NGOs led on the campaign to persuade the State House of Assembly to pass the bill, the FBOs' role in lobbying Assembly members and obtaining the support of religious leaders was vital. Churches provided a platform for campaigners to spread their message. They and religious leaders provided credibility, pastoral support and material resources. Tactical compromises, for example, including widowers as well as widows in the law, reduced opposition from men.
- The 2005 law prohibits the maltreatment of widows and widowers. Pressure for implementation has been maintained, with an emphasis on educating women about their rights and providing support to women seeking redress through mediation or the courts. Informants reported women's increased awareness of their rights and the law and a decline in (though not elimination of) harmful traditional practices.
- However, it has proved particularly difficult to implement the provisions on inheritance and the campaigning momentum on this has been lost, as organizations have moved on to other issues.

Depending on the issues at stake, religion has both served as a barrier to legal reform and provided moral and/or institutional support to the women's movement in Nigeria.

- Although several factors contributed to the failure of the CEDAW domestication bill, the research confirmed that religious opposition was significant. Nevertheless, religious and political leaders support the principles on which CEDAW is based and much of the bill's content, while some religious organizations and leaders provided support to the campaign.



- The widowhood rights campaign in Anambra State showed that the women's movement can build wide social support and that religious organizations and leaders can bring significant organizational resources, as well as supporting changes in social attitudes.

Overall, the case studies demonstrate that, although religion is implicated in gender inequalities and religious opposition may block legal reform designed to protect women's rights, constructive engagements between religion and women's rights agendas are possible.

Source: Para-Mallam et al, 2011; Adamu et al, 2011.

### Box 17: Mobilizing for Muslim women's rights in India

Research examined how activists advocating Muslim women's rights in India have tackled the question of religious difference and engaged with religious discourses and actors as part of their strategies to achieve social change. It describes the emergence of two networks, the religious Muslim Women's Rights Network (MWRN) and the secular Bharatiya Muslim Mahila Andolan (BMMA).

Advocates of social reform in the late 19<sup>th</sup> and early 20<sup>th</sup> centuries engaged positively with religious discourses, employing religious symbols to argue for women's rights, but the contemporary Indian women's movement that emerged during the 1970s has had a contentious relationship with religion. In the 1980s, the question of Muslim personal laws highlighted by the landmark Shah Bano case meant that to advocate Muslim women's rights, the movement had to tread carefully between the rhetoric of the Hindu Right and that of Muslim conservative groups. Although the women's movement fought for Muslim women's rights throughout the 1980s and 1990s, few Muslim women were present within the leadership of the movement during this time. Muslim women-led NGOs emerged during the 1990s and later formed national networks, including the MWRN and the BMMA.

Through interviews with members of both networks, the All India Muslim Personal Law Board (AIMPLB) and other women's organizations in Mumbai, New Delhi, Lucknow and Kolkata, the study examined whether and how the MWRN and the BMMA engage with religious discourses and actors, especially as part of their strategies to secure women's matrimonial rights. It explored the use by women's rights advocates of the *nikahnama*, or Muslim marriage contract, as a means of securing women's rights within the current legal framework

The key findings of the analysis are:

- Muslim women are increasingly organizing for social change both independently and as part of the wider women's movement.
- Both the networks have engaged with religious discourses and actors as part of their advocacy strategies. For example, they have attempted to engage with members of the All India Muslim Personal Law Board, although they have now largely abandoned this strategy because of a perceived lack of progress.

- Both networks actively challenge the idea that Muslim women are silent victims; rather than allowing this category to be defined by other political interest groups, they are re-shaping it to enable women to assert their rights as citizens.
- Both draw attention to the multiple forms of disadvantage faced by women in minority communities, including Muslim women.
- Both have used the concept of the *nikahnama* (Muslim marriage contract) as a means of overcoming the limitations of Muslim personal laws within an Islamic framework, although with limited success because, although the new contract complied with religious precepts, it was insufficient to achieve basic changes in attitudes and practices.
- Both are challenging the authority of the male religious elite to represent 'the Muslim community' as a whole.
- The women's movement is becoming increasingly diversified as members of minority groups, including Muslim and Dalit women, organize collectively both within and outside the movement. However, even when their rights are sanctioned by religion, women find it difficult to challenge wider patriarchal structures and social transformation is elusive.

Source: Kirmani, 2010, 2011.

### **Box 18: Hindu-Muslim violence in Indian cities and its aftermath: victims seeking justice and rebuilding their lives**

Hindu-Muslim violence occurred in the Indian cities of Mumbai in 1993 and Ahmedabad in 2002. Hindu violence against Muslims has roots in the Partition of India and Pakistan but also, more recently, in the emergence of a Hindu nationalist agenda. This study aimed to develop a better understanding of the role of religion in violence and its aftermath in India by examining the dynamics and immediate and longer term aftermath of the violence. It examined how Muslim victims coped with their tragedies, to learn how a 'new normal' is created following disruption of previous relations between communities, focusing on the roles played by the state, local leaders and activists, and non-governmental organizations.

The study drew on research undertaken by the author in Gujarat at the time of the violence in 2002 and a follow-up qualitative study based on secondary sources and extensive semi-structured interviews with Muslim victims, activists, government officials, politicians and others.

The study found that:

- Anti-Muslim violence is driven not by 'religious' differences or economic motivations, but by a Hindu nationalist agenda - riots happen in some places and not others because they are deliberately engineered for political purposes.
- The larger scale and more lasting effects of the anti-Muslim violence in Ahmedabad can be attributed to the backing provided to anti-Muslim sentiments and the violence itself by the government of the State of Gujarat, then and now under the control of the Hindu nationalist



Bharatiya Janata Party. In contrast, in Mumbai the government and security forces did their best to end the violence, supported by secular citizens, upright officials and concerned politicians, for example by establishing neighbourhood committees.

- Victims of inter-religious violence seek first safety, then shelter, a livelihood and continued access to education for their children. However, some continue to live in fear of repeated victimization and violence, especially in Ahmedabad.
- The Muslim community in Ahmedabad is mostly poor, and so the political and economic support provided to victims in Mumbai by affluent Muslim businesspeople was rarely available to them. Muslims are generally employed in casual work or the informal sector. Once the violence itself had died down, most were able to access the same or similar occupations, with similarly low incomes, although sometimes in a different part of the city. Some but not all of those with micro- or larger scale businesses were able to raise the funds to repair or replace lost property, stock and equipment.
- Muslims are keen to obtain education for their children. They choose schools that will best provide them with access to work opportunities, selecting the medium and content of education with this goal in mind.
- Because of the absence of a sizable and prosperous Muslim business community in Ahmedabad, Muslim victims had to rely on short-term relief and assistance from Islamic religious organizations (and a few secular non-governmental organizations). The same organizations assisted those who felt unable to return to their original neighbourhoods to relocate to new housing areas.
- In the longer term in both cities, the violence has led to increased segregation of residential areas along religious lines, as Muslims have sought security in Muslim-dominated areas.
- Those Muslim organizations that aimed to recruit Muslims to a radical Islamist agenda by providing relief and resettlement areas in Ahmedabad do not seem to have made much progress. While residents appreciated their efforts, they also criticized the organizations.
- The priorities of Muslim victims are first to seek safety, second to obtain the government compensation to which they are entitled, and then for houses to be repaired or built, livelihoods to be resumed and children to return to school. However, the inadequacy of the compensation payable and the obstacles to obtaining it, as well as the failure of the state to bring the perpetrators of the violence to justice, remain lingering sores, reducing their trust in the state to safeguard their rights as citizens.
- Their first priority is for the citizenship rights of all to be recognized and protected by the law and the courts, and for the perpetrators of past violence to be brought to justice, although government action to address the educational, economic and social disadvantages experienced by the Muslim minority is also essential.

Source: Gupta, 2010.

### 4.3 The roles of religious organizations in development and their implications for development partners

1. What roles do religious organizations play in development? What historical, religious and political factors explain the patterns and trajectories of the social roles of religions?
2. What is the scale and scope of development activities (such as service provision, community development, advocacy) by religious and faith-based organizations, compared to the state and other types of non-state organizations?
3. Do religious and faith-based organizations make distinctive contributions to development and service provision? How and why, with respect to:
  - a. inputs (the choice of activities, design of programmes, source of funding)
  - b. ways of operating (e.g. recruitment of staff, volunteers, beneficiaries; use of religious teaching, symbols and practices)
  - c. outcomes (results)
  - d. impact (contribution to development objectives such as poverty reduction, gender equality).
4. Does religion influence the characteristics and operations of non-religious organizations engaged in development and service provision? How and why?
5. What types of links do religious service providers have with government (and each other) (e.g. sub-contracting, regulation, allocation of funds, partnership)? How and why do these influence the services delivered? How have they changed, with what outcomes?
6. What are the implications of the characteristics and contributions of religious organizations for development partners, including various levels of government, official development partners and other external organizations such as international NGOs/ROs?

Little systematic data are available on the religious organizations involved in humanitarian and development activities in developing countries. Although extensive surveys were beyond the scope of the RaD research programme, broad overviews of their scale and scope were prepared based on available secondary sources and profiles of selected organizations. Despite inadequate data and definitional difficulties, it is possible to identify some common features, as summarized in Box 19.

Different approaches may be taken to identifying and assessing the ways in which religious organizations address development objectives. The research findings summarized in Box 20 address the question of whether faith-based organizations' contribution to activities related to HIV/AIDS in

Nigeria is distinctive by comparing selected religious and secular NGOs. In contrast, research in Tanzania examined the role of FBOs a similar range of activities in two typical rural districts (Box 21). Both stress the ways in which all non-governmental organizations have been influenced by donor agendas and the availability of particular funding streams. While the FBOs studied do appear to have some distinctive characteristics, in many respects they are quite similar to NGOs – this is not very surprising, given the high levels of religiosity and dependence on external funding in both countries.

The situation in Pakistan is somewhat different: in this predominantly Muslim country, religious injunctions that require regular charitable giving and activity have led to the emergence of indigenous philanthropic organizations that cannot be grouped in a single ‘faith-based organization’ category. Instead, case studies of a number of organizations (Box 22) showed that a more useful distinction is between local charitable and professional development organizations.

The final study summarized here (Box 23) focused on one type of religious service provider: the welfare wings of religious political parties in India, Pakistan and Bangladesh, focusing in particular on their motivations and organizational arrangements for these activities.

There are various other types of religious service provider, typically operating in the health and education sectors or providing care for especially needy groups – they operate at different scales, have varying organizational and funding arrangements, target different categories of users, have various formal and informal links with government service providers, and may compete or collaborate with each other. Sometimes, data on their contribution to service delivery in a particular sector has been assembled by government (for example, madrasa education in Pakistan) or sufficient data is available to assess the content and outcomes of the services delivered by a particular provider or class of providers. However, as with non-state providers more generally, there are large knowledge gaps in terms of the scale, scope and outcomes of their activities. In addition, as noted above, categorizing non-state providers into ‘religious’ and ‘secular’ is problematic and it may not be the most appropriate way of distinguishing different types of service provider (see also Section 5).

## Box 19: Mapping the development activities of religious organizations

The scale and scope of 'faith-based' development activities varies, depending on the definition of FBO adopted, a country's colonial history and religious composition, post-independence politics and government policies, local philanthropic traditions and aid dependence. In the absence of systematic data and a widely acceptable definition, and in the face of reluctance on the part of many informants to talk about religion because of its sensitivity, the 'mapping' exercise undertaken during the Religions and Development Research Programme was necessarily partial and illustrative rather than comprehensive and definitive. Although the four countries in which the research was undertaken have different characteristics and the mapping studies differed in their scope and coverage, it is possible to draw out nine general features of 'FBOs' engaged in development-related activities:

- i. The term FBO is everywhere problematic because
  - a. It arose in a Western context, specifically the rise of the religious Right in the US, is influenced by a specifically Christian notion of 'faith', and, in the context of developing countries, is mainly associated with the 'development industry' or not used at all. It has particularly problematic connotations in Pakistan.
  - b. It does not adequately capture the organizational expression of religious traditions and their development activities.
  - c. It is not easy to distinguish between faith-based and secular organizations. Nevertheless, in some countries new organizations that call themselves FBOs have emerged in recent years and some existing organizations have re-labelled themselves FBOs to tap into new funding flows that prioritize faith groups e.g. PEPFAR (the US President's Emergency Plan for AIDS Relief).
- ii. Religion has long been associated with welfare and philanthropic work that predates the emergence of development as a global concern, the association of mission with 'development' work in the colonial period and the more recent rise of 'FBOs'. In particular, because the non-Christian religions generally predate European colonialism, philanthropic activities associated with Islam and the Indic religions have a longer history in many developing countries.
- iii. European colonization brought Christian missionaries who, alongside their aim of conversion, set up schools and hospitals. In some instances, this was accompanied by an increase in organized activity within some existing religious traditions, for example, becoming more active in education to counter the impact of mission education. Colonial governments also sought to institutionalize voluntary organizations, to formalize and control their activities.
- iv. After independence, existing religious organizations had to re-negotiate their relationships with newly independent governments as well as (for the churches) their relationships with their mother churches. The tricky nature of some of these relationships, as well as the state-led model of development adopted by most post-independence governments in the 1950s and 1960s, and increasingly authoritarian rule in many countries, inhibited the growth of civil society in general, including faith-based development activities. Governments' fear of the destabilizing effects of religious competition and acceptance of responsibility for service delivery led in some instances to the nationalization of education and health services (and *zakat* administration in Pakistan).

- v. However, many of these arrangements have subsequently been reversed. Political and economic liberalization and increasingly overt religious expression in the public sphere, plus increased external funding, led to the reinstatement of some activities and growth in the numbers and scope of religious organizations and facilities, including radical FBOs with extremist or sectarian agendas, including Islamist organizations and right-wing Hindu cultural nationalist groups.
- vi. The scale of FBO involvement in development today is significant, but it is impossible to give exact estimates, because it depends, for example, on how development activity is defined and whether unregistered as well as registered organizations are included. There is no comprehensive data and systematic information is scarce. In addition, the number of organizations does not necessarily indicate the scale of activity. It appears that the proportion of Christian organizations in the total (in terms of both numbers and the scale of activities) might exceed their proportion of all religious adherents, because of doctrine, their history, the organizational structure of Christian churches and their international networks. However, recent increases in the number of FBOs have occurred in Islam as well as Christianity.
- vii. FBOs are engaged in emergency relief, education, health, feeding the poor, care of orphans, care for people living with AIDS and so on. While many of these are traditional charitable concerns, many organizations also undertake development activities designed to improve livelihoods and support communities. Some organizations are re-casting themselves as development agents, partly to access new funding streams. Although some are deliberately inclusive and oriented to the poor, many primarily benefit members of their own faith tradition, who are not always poor.
- viii. Engagement in socio-political activities is both less common and very varied, ranging from the establishment of Buddhist organizations to address the disadvantages experienced by Dalits converting from Hinduism to Buddhism in Maharashtra to Christian-Muslim alliances opposing government policies (especially those concerned with reproductive health), radical organizations seeking to establish an Islamic state, and others that try to counter extremism and increase inter-religious dialogue.
- ix. The range of activities and the organizational arrangements through which they are provided varies between and within faith traditions, related to their history, values and beliefs, organizational structure, size and reach. In addition, it is influenced by the relationships between religious organizations and governments, which affect the scope for autonomous action by religious organizations and the availability of funding. The influence, legitimacy, resources and organizational capacity of religious organizations may be considerable, especially in rural areas, where few other such institutions exist. Sometimes, given the deficiencies in state provision, their contribution is important (e.g. Nigeria, Pakistan), but often their community level work is too small scale or charity-oriented to make a significant contribution to poverty reduction and sustainable development. In addition, some doubt the efficiency of their management and the effectiveness of their activities.

The research also reveals that despite their different characteristics, many FBOs in different countries face similar challenges, for example:

- Complicated relations with government and secular civil society organizations.
- Whether to provide services and facilities solely for members of their own religious group or to the wider community.
- Funding shortages, despite their ability to draw on religiously mandated charitable giving.
- Different ideas of 'effectiveness' from governments and international development partners.

Source: Iqbal and Siddiqui, 2008; Jodhka and Pradyumna, 2009; Leurs et al, 2011; Odumosu et al, 2009

## **Box 20: Are faith-based organizations distinctive? A comparative study of selected religious and secular non-governmental organizations in Nigeria**

In Nigeria, case studies of three NGOs and four FBOs (two Christian and two Muslim) in largely Muslim Kano State and religiously mixed Lagos State sought to identify whether and in what circumstances FBOs have distinctive characteristics with respect to their goals, values, organizational characteristics and activities. All the organizations studied are well-established and are engaged in HIV/AIDS-related work (one of the main areas of development work for which funding is currently available and in which differences between secular and religious organizations might be expected).

After 2000, the Nigerian government's desire to address the rising incidence of HIV/AIDS raised sensitive issues, as did the proliferation of NGOs attempting to implement relevant programmes, especially in largely Muslim areas, where they were perceived as donor driven and lacking in credibility.

The study did not find significant differences in the development-related aims, values and activities of organizations self-identified as FBOs or NGOs. Those studied share a commitment to humanitarian, charitable and service delivery aims; some are also engaged in development, advocacy and conflict resolution activities, especially those exposed to international development thinking. However

- FBOs generally justify their activities, including their HIV/AIDS-related work, in religious terms and use religious language and practices in their work. In addition, the truth claims of both Christianity and Islam encourage adherents to seek to spread their religion. FBOs therefore believe that they have a responsibility to do so and often see their humanitarian activities as a means to that end.
- NGOs, in contrast, express their mission and values in secular humanitarian terms, even when their founders, employees and volunteers have religious motivations, as many do in a society where almost everyone considers him or herself to be religious. Despite this, observers consider NGOs to be less able and willing to adhere to religious principles in their practices.



Differences between FBOs and NGOs were more evident with respect to programme design and organizational characteristics.

- An organization's values influence the design, implementation and evaluation of the HIV/AIDS programmes it delivers, including the targeted populations, with only one of the NGOs targeting high risk groups who engage in behaviour of which FBOs disapprove, such as sex workers. In addition, the organizations vary in their willingness to advocate condom use by the unmarried, with religious organizations stressing abstinence and faithfulness to prevent transmission. Some foreign funders (especially those with religious affiliations) are willing to accept religious objections to condom use, enabling some FBOs (both Christian and Muslim) to access international funding for their programmes.
- NGOs' activities have a predominantly material focus, emphasizing physical wellbeing, while FBOs combine material and spiritual aims, which influences the content and delivery of their programmes. For example in HIV/AIDS awareness and prevention, NGOs emphasize physical aspects and choice, and advocate the use of condoms. In contrast, FBOs use religious justifications for their messages and stress the moral basis for behaviour, but also provide spiritual succour to the users of their services. Most beneficiaries seem to prefer FBOs' combined material and spiritual focus.
- All the FBOs studied deliberately recruit staff from within their own faith tradition, at least for senior positions. In addition, they display symbols of their religion in the dress of their staff, in their facilities and on their vehicles. They also (like at least one of the NGOs) observe daily prayer rituals.

Organizations perceived as committed to relevant development objectives, effective and reputable were chosen for this study, so major differences in priorities, perceived performance or allegations of malpractice were not anticipated. Unsurprisingly, their leaders, staff, local stakeholders and beneficiaries had positive perceptions of their performance. Differences in the perceived performance of FBOs and NGOs were not marked. However:

- while some beneficiaries feel that the NGO approach to condom use is likely to be more effective, others prefer FBOs' focus on abstinence and behaviour and their approach to HIV/AIDS education, which uses moral and religious values and messages.
- what appears to matter most is the perceived quality of the service provided, judged in terms of an organization's local presence, frequency of contact with local communities and the nature of the services provided.
- few, if any, NGOs and FBOs do systematic assessments of the outcomes and impact of their activities. While those organizations that receive official donor funds are required to systematically monitor progress against objectives (using targets and quantitative indicators), FBOs believe that whether their operations and activities comply with religious values and injunctions is a more important criterion for assessing performance.

Many beneficiary respondents feel that FBOs, in general, have some advantages over NGOs (e.g. a long history, an ongoing presence in communities, higher levels of trust, greater financial independence, and autonomy in setting locally responsive development agendas). FBOs' (partial) financial independence depends on religiously mandated giving, which is significant for most of those studied. However, several also rely on international donor funding (as do the NGOs). For some functions, however, NGOs are regarded as having advantages, for example, greater expertise.

Both NGOs and Christian FBOs find it difficult to work in largely Muslim Kano State. In this context, traditional religious leaders (and Islamic FBOs) can provide NGOs with legitimacy and access to local communities and NGOs are perceived to be more successful if they work with FBOs and religious leaders. Thus the context in which an organization works matters and this may affect their performance more than any religious/secular difference.

Source: Davis et al, 2011

### **Box 21: The development activities of non-governmental and faith-based organizations in Magu and Newala Districts, Tanzania**

This study examined the position and role of religious organizations within a wider range of CSOs at the local level in two rural districts (Magu, prosperous, largely Christian, and Newala, remote, poor, largely Muslim), to assess whether faith-based organizations play a significant and distinctive role in development.

The traditional Christian churches (especially Catholic, Lutheran and Anglican) established educational and health facilities during the colonial period and continue to have a major role in service delivery. In addition, they and other churches have established projects or organizations for other development purposes. Only the largest of these organizations can raise significant funds, enabling them to take some independent initiatives. Although nationally significant, their facilities are thinly and unevenly spread over the country – they do not have significant facilities in Magu or Newala. Provision of educational and health services by Muslim organizations is mostly small scale.

During the period of one-party rule, autonomous civil society organizations (CSOs) were rarely permitted, but since political liberalization in the early 1990s, a civil society sector has been aggressively promoted through international spending and targeted programming. Today, larger CSOs are mostly branches of international NGOs; the majority of CSOs are small and revolve around a founding person or small group of people.

The research in Magu and Newala found that

- CSOs are mostly small and almost entirely dependent on external donors, with much of the funding stream in the five years prior to the study linked to
  - HIV/AIDS awareness and prevention, disbursed through TACAIDS (Tanzania Commission for AIDS), or
  - Welfare support for Most Vulnerable Children (poor children and orphans), especially USAID funding distributed through Pact (an American organization) to CSOs via District Councils.
- By 2009, most CSOs in the districts studied (including FBOs) saw these as their key areas of work, even though many had been established to undertake other activities. Supply-driven funding has led to increased numbers of CSOs and competition between them for small grants to undertake similar activities.



- While formal registration is required to access funds, no expertise in the relevant area (HIV/AIDS or MVCs) appears to be required. Where specialist knowledge or skills are needed, implementation tends to be sub-contracted to other organizations or local authority staff.
- There are fewer organizations associated with Islam than those linked to the main churches, although BAKWATA, the government-supported Muslim umbrella organization, has assumed a role in promoting projects that can obtain international donor funding.
- In such a donor-driven and aid-dependent context, the assumed boundaries between CSOs, NGOs and FBOs are blurred and the different types of organization have similar development aims and activities. Also most of those involved in NGOs are religious adherents. FBOs do not appear to be especially close to the poor or to have a special religiously informed view of development.
- It is difficult to assess whether religious values lead to different developmental outcomes or FBOs' contribution to the achievement of development objectives, first because there are few institutional settings in which religious values are not influential, and second, because the funding available to CSOs, including FBOs, is for intangibles (e.g. HIV/AIDS awareness) or short-term.

Donor support has been central to the evolution of the civil society sector, including FBOs: capacity building and criteria for accessing funding favour those organizations that fit an international template, determine which organizations are active (those that succeed in obtaining funding) and largely determine their activities (those for which funding is made available).

Source : Green et al, 2010

## **Box 22: The role of faith in the charity and development sector in Karachi and Sindh, Pakistan**

The aim of this study was to explore how 'faith-based organizations' are understood and operate in the context of Pakistan, with a focus on Karachi and Sindh province.

Historically religion in South Asia has been deeply involved in attempts to alleviate poverty, through philanthropic activities. The emergence of NGOs, however, is a more recent phenomenon, beginning in the period following Partition in 1947, when voluntary organizations emerged in Pakistan to address the refugee crisis. However, it was not until the 1980s, against the backdrop of the Afghan War and the accompanying influx of foreign aid, that this sector grew exponentially. These developments have shaped contemporary civil society, particularly the voluntary/philanthropic sector, and must frame any discussion of 'FBOs' in the Pakistani context.

The research focused on Karachi, within the wider context of Sindh province and Pakistan as a whole. The study was based on semi-structured interviews with staff, volunteers and beneficiaries and aimed to shed light on the role of religion in organizations engaged in development-related activities. It focused on six large indigenous organizations (the Al Khidmat network, the Alamgir Welfare Trust, the Saylani Welfare Trust, the Edhi Foundation, the Behbud Association and Caritas), which were compared with professional development organizations, for which religion has no apparent role.

The findings include:

- With the exception of Caritas, the Christian organization studied, most of the organizations identified as 'faith-based' are indigenous and funded through individual donations.
- Faith is intertwined in their work to different degrees; local charitable organizations can be distinguished from professional development organizations, which have no apparent relationship with religion.
- Local charities focus on meeting immediate, individual needs rather addressing than long-term development objectives.
- There is little or no cooperation or dialogue between charities and professional development organizations.

The study concludes that:

- 'FBO' is a problematic category in the Pakistani context, as religion operates in complex and varied ways within organizations.
- Religion is implicit in the values and functioning of Pakistani organizations that are charitable in nature, with the exception of minority religious organizations, whose religious identity is explicit.
- Organizations that frame themselves as being part of the 'development sector' are generally non-religious or secular in nature.
- The role of religion within an organization is tied to its funding structure; its location within local, national and international networks; and the political and ideological profile of its members.

Source: Kirmani and Zaidi, 2010.

## Box 23: The provision of welfare and educational services by religious political parties

Religious political parties, which are constitutionally permitted in some countries but barred in others, generally have wings or associated organizations that provide social welfare services, including education, healthcare, emergency relief and orphan support. For example, Vidya Bharati (VB), one of the network of organizations associated with the Hindu nationalist Bharatiya Janata Party (BJP) in India, runs an extensive network of schools, and the Jama'at-i-Islami parties in Pakistan and Bangladesh are involved in a wide range of charitable, welfare and service provision activities.

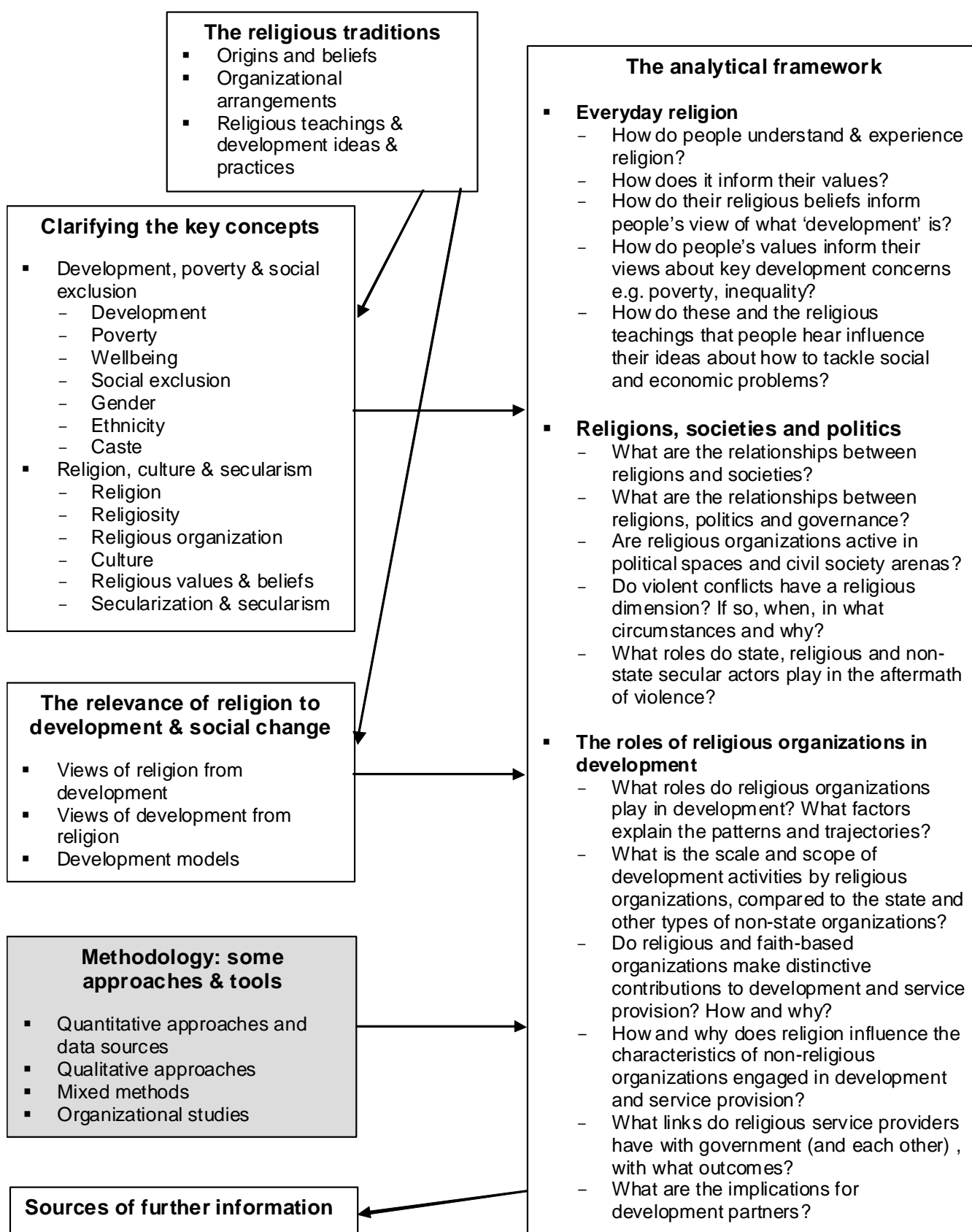
The research was based on reviews of published and other secondary sources, including documents produced by the organizations under study, as well as semi-structured interviews.

- In **India** documents and 22 interviews with key informants in three Hindu organizations (Rashtriya Swayamsewak Sangh, the Bharatiya Janata Party and Vidya Bharati) showed that:
  - VB's schools seek to groom young minds towards the concept of a Hindu nation, but there are tensions between VB and the BJP, because the former fears that the latter is watering down its commitment to Hindu nationalism in its search for broad electoral support.
  - During periods of BJP rule, the pressure for Hindu nationalist ideology to be incorporated in the curriculum in both VB and government schools has not been adequately addressed by national and state education ministries ostensibly committed to constitutional secularism.
- In **Pakistan** and **Bangladesh**, the research drew on semi-structured interviews with leaders, members, senior managers and officials of the welfare wings of the Jama'at-i-Islami political parties in each country, beneficiaries of the welfare services provided and local academics and analysts. It demonstrates that the welfare programmes
  - are intended to demonstrate the parties' commitment to their religious ideology, in order to attract a cadre of committed members – the desire to attract votes is a less important motivation.
  - are organized in very different ways for historical, political and practical reasons: in Pakistan through a network of its own welfare and service delivery organizations; in Bangladesh through Jama'at-i-Islami members playing key roles in the management of apparently independent organizations.
  - require a well organized party structure, meaning that smaller and less well organized religious political parties have much less extensive service delivery programmes.
  - charge a basic (below market rate) fee for the services they provide (except to those who cannot afford to pay), which users are prepared to pay because of the perceived good quality of the services provided.

Conventionally, religious political parties' engagement in providing social welfare services is attributed to their desire to attract votes, undermine government legitimacy and compensate for gaps in government service delivery. The research provided some confirmation of these assumptions, but also showed that parties become involved in service delivery to demonstrate and promote their ideology and attract committed their members.

Source: Bano, 2009; Nair, 2009

## Figure 1: A guide to analyzing the relationships between religion and development



## 5 Methodology: some approaches and tools

As briefly discussed above, the ‘insider’ disciplines of theology and related approaches are concerned to interpret the teachings, values, beliefs and histories of particular religions. Their aim is generally to inform adherents, those responsible for teaching, those with authority to direct the behaviour of adherents (for example with respect to gender relations, sexual behaviour or charitable giving) and organizations associated with the religious tradition, such as charitable, development or advocacy organizations. It is important to understand the outcomes of this scholarship, because it may have a significant influence on the attitudes and behaviour of adherents.

However, to identify the links between religion and development, it is more important to understand whether and how religious teachings, stories and myths are taught, passed on and interpreted by religious leaders and adherents in specific contexts, where they are probably influenced by other sources of values and beliefs and other stories. A different approach is needed for this purpose.

Within the social sciences, views differ on the most appropriate methodology for identifying and analyzing people’s views and beliefs. They may broadly be categorized into two:

- quantitative approaches in which responses are sought to structured questions, and
- qualitative approaches that permit and encourage respondents to put their answers in their own words.

### 5.1 Quantitative approaches

Quantitative methodologies enable a relatively large number of respondents to be included and permit generalizations to be made about the wider population on the basis of a sample.<sup>6</sup> Some examples of sources of quantitative data on religion are given in Box 24.

## Box 24: Quantitative research on religion

Most statistics on religious demography, beliefs and practices are based on one-off surveys that provide a snapshot of the situation at one point in time, but some successive censuses or surveys make it possible to identify trends. They are mostly used descriptively, although more extensive analysis has been done of World Values Survey data. Some examples are given below.

**Censuses** in some countries include a question on religious affiliation. However, they do not in others, usually because of inter-religious rivalry and the relationships between religion and politics or social deprivation. Having to answer such a question may force people to classify themselves into predetermined categories that do not reflect reality (as in colonial censuses in South Asia). The picture that emerges generally does not distinguish between being born into a religious tradition and a person who chooses a religious community, adheres to its doctrines and beliefs, participates in its rituals and attempts to live by its moral injunctions. In addition, there is an interval of at least ten years between censuses and in some countries the data generated are unreliable.

Successive **Demographic and Health Surveys** are available for a large number of countries in the South: these are good quality national sample surveys that often include one or more questions related to religion. Typically, they sample several thousand households, interviewing people aged 15-49, sometimes over-sampling or only sampling women, which is a limitation because religious affiliation may differ slightly between men and women (<http://www.measuredhs.com/> <http://www.statcompiler.com/>)

Some sample surveys conducted by opinion polling organizations such as Afrobarometer or Gallup include questions related to religious affiliation or views. Only limited information is publicly available from **Gallup International's Voice of the People 2005** (commissioned by the BBC) <http://www.voice-of-the-people.net/> and its **Millenium Survey 1999** <http://www.gallup-international.com/ContentFiles/millennium15.asp>. Data from **Afrobarometer's** Round 1-4 surveys in 12, increasing to 20, countries (1999/2000 to 2008/9) are available online at <http://www.jdsurvey.net/jds/afrobarometer.jsp> and it also publishes Briefing Papers on specific topics.

The **World Values Surveys** <http://www.worldvaluessurvey.org> are repeated surveys of samples of at least 1,000 respondents, which have been undertaken in an increasing number of countries since 1981. The original surveys were in Europe, but developing countries started to be included in 1990. Overall, there have been five waves to date, the data from which are available online at <http://www.wvsevsdb.com/wvs/WVSAanalyze.jsp>. Their aim is to examine continuity and changes in people's beliefs and values concerning religion, political life, work motivations, gender roles and tolerance of other groups. Several compilations and analyses of the data are available, for example, Halman et al, 2007; Inglehart, 2003; Inglehart and Baker, 2000; Inglehart and Welzel, 2005. For a critique see Halman, 2002.

The **Pew Forum on Religion and Public Life** Global Attitudes Project <http://pewglobal.org/> has carried out national sample surveys in varying numbers of countries since 2001 <http://pewglobal.org/category/data-sets/>. The Pew Forum also conducted a more detailed survey of

renewalist (Pentecostal and charismatic) Christians in ten countries (including eight developing countries) (and a national sample of Christians for comparative purposes), to identify what proportion of Protestant Christians are renewalist and to throw light on their religious, political and civic views (Pew Forum, 2006).

More recently, it conducted sample surveys of at least 1,000 people in 19 sub-Saharan African countries (1,000 in six, 1,500 in the remainder) to identify trends in the proportions of Muslims and Christians and ascertain how people view the role of religion in their lives and societies, including their religious beliefs and practices; their knowledge of (and attitudes toward) other faiths; their degree of political and economic satisfaction; their concerns about crime, corruption and extremism; their positions on issues such as abortion and polygamy; and their views of democracy, religious law and the place of women in society. Particular attention was given to whether people (including Muslims and Christians) claim that they hold beliefs associated with traditional religion and engage in traditional practices (Pew Forum, 2010)

Censuses and sample surveys involve large numbers of respondents, and so for logistical and analytical reasons, the questions they contain generally include pre-coded answers from which respondents select one or more (closed questions). Well-designed census and survey questions can provide useful information on characteristics and opinions, and they can link these with characteristics that are to do with matters other than religion (e.g. socio-economic status, educational level, sex, age). However common criticisms include:

- not all respondents interpret a question in the same way
- closed questions simplify complex realities
- respondents may be asked for an opinion on a subject they have not previously considered
- important issues may be omitted from a pre-designed questionnaire and there is no scope for adapting or adding to the questions once the survey is under way
- selection of a sample may be biased, especially if a complete list of intended respondents is not available (e.g. towards those who are easier to contact or share the characteristics of the interviewer)
- a census avoids sample bias but is costly, as are the large samples and complex questionnaires necessary to produce reliable data on non-uniform populations and complex social phenomena, such as livelihood strategies.
- the designer's supposed objectivity may conceal preconceptions that bias the design of the research and interpretation of the results.



The surveys undertaken by the Pew Forum illustrate some of the strengths and weaknesses of this approach for studying religion.<sup>7</sup> For example, the sample survey in Tanzania revealed that 62 per cent of respondents claim six or more of eleven traditional beliefs (the protective power of certain spiritual people, the power of juju and other sacred objects, the evil eye, witchcraft, evil spirits, the protective power of sacrificial offerings to ancestors and reincarnation) and practices (visiting traditional healers, owning sacred objectives, participating in ceremonies to honour ancestors and participating in traditional puberty rituals), even though 90 per cent claim to be Christian or Muslim, 82 per cent attend religious services at least once a week and about 80 per cent believe the Bible/Qu'ran is the literal word of God. In contrast, in Nigeria, where the proportions professing Christianity or Islam are similar (98 per cent are Christian or Muslim, 88 per cent attend religious services at least once a week and about 90 per cent believe that the Bible/Qu'ran is the literal word of God), only 8 per cent claim six or more traditional beliefs and practices (Pew Forum, 2010, p 20, 26, 27, 34). This latter figure is unconvincingly low, possibly demonstrating more about what it is socially acceptable to acknowledge to an unknown interviewer than people's actual beliefs and practices.

## 5.2 Qualitative approaches

Qualitative approaches draw on the ethnographic methods used in anthropology. Data collection instruments include informal conversation, semi-structured interviews, group interviews (focus group discussions), observation and documentary review. Researchers' field notes and the discourse (oral or written) are analyzed. These methods provide thick description, are based on respondents expressing their personal views and interpretations of phenomena in their own words, and enable both respondents and researchers to direct the enquiry to follow up unforeseen topics. Those using them try to be aware of how their own assumptions influence what they see and how they interpret it, and the ways in which the outsider status and identity of a researcher can influence the responses of study subjects. However, common criticisms of these approaches include:

- Despite attempting to reflect the views of those under study as faithfully as possible, researchers do not always succeed – their own preconceptions and position bias the data they collect and what they make of it.
- A case study approach with one or a few examples means that a study provides knowledge about a particular context, potentially in considerable depth, but that its findings cannot necessarily be generalized more widely.

Both approaches are challenged as extractive if they are carried out by external researchers. Not only do the research subjects often not see the results of the research, they cannot use the knowledge generated to achieve their own objectives and do not develop the skills to overcome one of the symptoms and causes of poverty and deprivation – limited knowledge. Participatory approaches to information collection and analysis, project design and policy making have been developed to try and address these concerns. They typically use simplified ethnographic methods such as semi-structured interviews, FGDs, mapping and observation. It is claimed that they

- produce more reliable results than research by outsiders (although outsiders are often used to facilitate the process)
- result in more appropriate, feasible and locally owned policies and projects, and
- empower those involved to exercise voice and to monitor outcomes by repeating the information gathering exercises themselves.

However, they are also criticized for

- often using the methods in a slipshod way
- reflecting existing unequal power relationships
- being subject to manipulation by policy makers/project designers, and
- resulting in cynicism if the findings do not influence decision makers.

There is insufficient space here for a systematic review of the strengths and weaknesses of participatory approaches (but see, for example, Campbell, 2002; Laderchi, 2007).

Ethnographic studies are time intensive and so not feasible in many contemporary development contexts. In response, less resource intensive uses of the approach are being developed and can be used to tackle some of the questions outlined above, for example, to ascertain how people understand their religion and how it informs their ideas about development concepts and approaches.

A summary of the approach used to investigate local religious teachings relevant to development ideas and approaches and their interpretation at the local level is given in Box 25.

## Box 25: Rapid ethnography

Traditionally ethnographic studies rely on the long-term immersion of a highly educated researcher (typically an anthropologist) in a community, perhaps with an interpreter. However, ethnographic methods have been adapted for use when time and resources (including researchers trained in ethnographic methods) are limited.

Research to build understanding of the links between local people's religious lives and their daily concerns and visions for the future, as well as ways in which social and economic improvements might be achieved, used rapid ethnographic methods. It examined how the teachings of selected faith traditions are interpreted by religious teachers and those they reach at the local level, how such teachings inform the values and beliefs by which people live and how they influence ideas about aspects of development. The research yielded insights into lived religion; revealed social, cultural and religious differences; and made audible voices that may not be heard when more formal research techniques are used.

As part of an international comparative research project, two sites with a different religious composition (or orientation, for example liberal and conservative Islam) in each of the four countries under study were selected, each with urban and rural locations. In all the locations, the 2-person research teams had a gender balance, and in the multi-religious locations, they had a religious balance as well, requiring 4-person teams.

The concept of public and private spheres of life framed the design of the study, including data collection and analysis. The research was undertaken in two stages:

- Identification of the teachings and dominant views expressed in **public** religious and secular spaces through the use of publicly available documentary material e.g. pamphlets, sermons and some semi-structured interviews with religious and community leaders and organizations.
- To determine people's **private** awareness and interpretation of these teachings and how they individually see the world, a combination of informal conversations, observation and semi-structured interviews were used, recorded mostly in field notes. The researchers positioned themselves in informal meeting locations such as markets, teashops and places of worship, and sometimes visited people's homes. Informants were asked about their everyday lives and concerns, their hopes for future, and what they see as the obstacles preventing them from achieving their potential and doing the things they want to. Rather than using terms like 'wellbeing' and 'development', people were asked about what it is to be happy and contented and about their welfare and needs. The aim was to produce a narrative that recorded, revealed and interpreted people's lived experiences.

The research sought to clarify

- whether people's views about some key development issues, such as wealth, poverty and gender, are influenced by their religious values and beliefs, and
- how (if at all) these values and beliefs influence their views on some common tools used to address inequality and poverty, especially girls' access to education and microcredit.

To structure the data collection, recording and analysis, a grid that set out the specific issues and research questions and distinguished between views expressed in the public and private spheres was used. This set out the topics on which data were required, while collective analysis enabled the research teams to identify issues to be followed up and additional groups of informants, settings and spaces to be included in further data collection and analysis

The distinction between public and private spheres enabled the researchers to study both authoritative views and the everyday spaces in which 'gossip' occurs. Because these are spaces in which people are less likely to feel constrained by traditional authority figures or traditional/prevaling views, the informal conversational and observational methods used revealed what people actually think about their lives.

However, in addition to its strengths, rapid ethnographic research raises a number of issues.

- First, time limited research implies that local researchers are responsible for data collection. This has advantages: they have more local knowledge and cultural understanding than 'outsider' researchers and face less of a language barrier. However, potential disadvantages include:
  - relatively limited levels of formal knowledge and data collecting, reporting and analysis skills
  - the possibility that their own ideas, views and goals are intruded into the research.
- Second, multi-sited comparative international research can produce insights that would not be generated by single site research, but for comparable research questions and methods to be used, good coordination is needed. However, a common design may fail to recognize and reflect either local variation or the knowledge and experience of local researchers, limiting the latter's understanding of the aims and requirements of the project as a whole and their ownership of it. Ideally, the knowledge and experience of local research teams should be the starting point for and integrated into the research design.

Any ethnography must pay careful attention to the position of the researchers involved, reflecting on how their assumptions and multiple identities might influence the responses of research subjects, the data selected and the interpretations made. Both outsiders and insiders may have different social characteristics from their research subjects, their own preconceptions and face language barriers. However, the 'position of the self' is also different for outsiders and insiders – the latter participate in the society under study, for example in gendered roles and/or as adherents of a particular religious tradition, sect or denomination or none. As a result, they bring personal knowledge, values and experience, as well as a perceived identity and status in the eyes of informants. This raises questions about how local researchers' personal knowledge should be factored into the research and how their research roles might be influenced by their views and multiple identities.

Based on two unpublished draft papers by Tamsin Bradley, 2010

### 5.3 Mixed methods

Many researchers do not see quantitative and qualitative methods as alternatives and instead seek to realize the advantages and address some of the weaknesses of both by using a combination. This approach is exemplified by the methodology developed to study the links between religion, wellbeing and development (Box 26).

#### Box 26: Mixed methods for studying religion and wellbeing

Research that aimed to examine everyday understandings and experiences of religion at community, household and individual level defined three research questions:

- The first addressed the simplest understanding of religion in India, as a social identity, an accident of birth rather than a marker of personal belief or conviction: *What is the significance of religious identity to the wellbeing outcomes of different population groups?*
- The second shifted the focus away from politics onto religion as lived experience: *How does religious identity and sensibility inform people's actions and behaviour in everyday life?*
- The third recognized that neither religion nor wellbeing is a fixed, static entity: *How are understandings of and interactions between religion and wellbeing changing over time?*

The research was comparative: it sought to compare findings from locations with different levels of development: four different sites (two urban, two rural) in two contrasting states, one wealthier and highly developed (Punjab), one poorer and less developed (Orissa). Within each location, it also sought to compare findings across different caste and religious groups.

The study was concentrated in specific villages or neighbourhoods, rather than seeking to produce a random sample of respondents across districts or municipalities, for two reasons:

- Religion is understood as something lived in community, not simply a matter of personal belief, so it was important to get to know the local context and how religion featured in it, not simply produce data from a set of unconnected individual respondents.
- Many of the things about which information was sought were personal and difficult to ask about directly: it was expected that becoming known in a particular place would enable members of the research team to get to know people and become known themselves, thereby obtaining high quality data.

The studies were undertaken in three stages.

**Community profiling** in order to get to know the communities under study and gain a sense of the part religion plays in their common life. This involved a mix of observation, key informant interviews, participatory exercises and focus group discussions. In addition to the usual information on the composition of a community in religious, caste and economic terms; the main institutions; access to services, etc; the profiles paid particular attention to religion.

- To get a sense of the spatiality of religion, community mapping identified not only the location of temples and mosques, but also graveyards, shrines, spiritual healers and places people fear to go because they are thought to be inhabited by spirits.
- To get a sense of how religion structures time, people were asked about daily and life-cycle rituals, and also the annual round of festivals celebrated in the area.
- To learn about religious governance, people were asked about temple and mosque committees, and the role – if any – of religion in local politics or administrative structures. During this phase background information was also gathered from government statistics.

A **survey** of 1,200 households, spread equally between the four sites. Respondents were heads of households or their spouses, with equal numbers of men and women interviewees. The purpose of the survey was to obtain quantitative data that could show the distribution between religious communities of wellbeing defined in material, relational, and subjective terms (question one above). The aim was therefore to achieve a sample in which all the religious communities were well represented, rather than one that reflected the overall religious composition of either the state as a whole or the local area, although this placed some restrictions on the analysis.

To help answer questions two and three, some questions on religion and religious practices were included in the survey, to identify how religion figures in people's everyday lives and to gauge directions of change. The questionnaire comprised six sections and had both objective and subjective elements.

- It covered demographics; education; livelihoods and assets; access to services; changes in religious practice; health and disability; and relations of social obligations and support.
- The subjective elements involved questions about respondents' levels of satisfaction with a range of social services such as health and education. People were also asked to compare their current situation with that of their neighbours, times past, and their aspirations. The questionnaire closed with two sections that were wholly subjective. The first asked people to rank on a four point scale their level of agreement with statements assessing the quality of their social environment and how they felt in it. The second asked about their values and opinions. Some questions specifically concerned religion, others were more general. Overall they were designed to provide a rough gauge of whether respondents were more traditional (conservative) or modern (liberal) in outlook.

The survey was valuable in a number of ways. In particular, it provided data to address the first research question, about the significance of religion to wellbeing outcomes. Factor analysis was then used to derive a wellbeing index, enabling various factors that might explain differences in levels of wellbeing to be tested.

**Semi-structured interviews**, which aimed to get a deeper sense of how religion figured in people's everyday lives, and how people thought about it, to address research questions two and three. Forty preliminary and forty in-depth interviews were undertaken across the sites. In addition to asking specific questions, the researchers listened carefully to *how* people talked about religion. The breadth of both religion and wellbeing as subjects of discussion, coupled with the need for interviews which were sufficiently similar to enable comparative analysis, meant that a reasonably strong interview guide was used.

This started with an overall question about wellbeing and followed up by asking how religion was important to respondents personally. They were then asked in turn about different areas of life: their economic situation, health, family relationships and education, what was important to them within each of these domains and how they saw themselves doing in relation to their aspirations. In addition, they were asked how important religious institutions and organizations are in providing welfare and social support and how significant they consider religion to be as a source of authority and values.

Source: White et al, 2011.

## 5.4 Organizational studies

In addition to personal lived religion, the study of religion and society involves analyzing the characteristics, strategies and actions of organizations. As discussed above, this first implies a need to 'map' an organizational field, to provide information on the number of organizations of relevant types and the scale and scope of their operations. Because government data collection and record-keeping is far from comprehensive, systematic information of this sort is rare or non-existent in most developing countries. It does not exist, for example, for all non-state providers of services, savings and loan associations, civil society organizations or religious congregations. Sometimes government requirements for registration (for example, of NGOs) or reliance on non-state providers of services (especially education and health) may gradually pull many of the organizations into official records. In addition, hierarchically organized religious bodies (such as the Catholic and other traditional churches, some Muslim educational boards) often keep good records.

Elsewhere, identifying the scale and scope of religious organizations and their roles in development is tricky not just because of the difficulty of defining them and distinguishing them from 'secular' organizations, as noted above, but also because of the lack of systematic information. When challenged to justify their views about or involvement in a development issue, religious organizations themselves admit that the lack of information weakens their case and is a failure on their part. In some circumstances, it may be desirable and possible for researchers to work with religious communities themselves to improve their information base. Otherwise, significant resources are needed to assemble comprehensive information and all that can be achieved is an impressionistic overview or broad scale 'map' of the terrain, built up from existing information sources and the knowledge of well informed actors. Constraints include



- the very large number of congregations and religiously motivated small organizations that may or may not be attached to congregations
- informants' lack of knowledge about faith traditions (or denominations) and geographical areas other than their own.

Nevertheless, a picture can be gradually assembled by starting with one or more small geographical areas, as in the 'mapping' of civil society organizations that was undertaken during the first stage of research comparing religious and non-religious organizations' HIV/AIDS related activities in two districts of Nigeria and Tanzania.

To assess the characteristics, contributions and possible distinctiveness of religious organizations involved in welfare, development and advocacy, detailed studies of a subset of organizations are also needed. One possible tool in the identification of criteria by which an appropriate subset of organizations can be identified is a typology, an attempt "to reduce the complexity of the world, an effort to categorize and make sense of diversity" (Hefferan et al, 2009, p 9). A typology can also be used to analyze and compare organizations, perhaps being adjusted in the light of empirical investigations.

However, because organizations vary with respect to more than one characteristic, attempts to devise typologies of religious or faith-based and secular organizations have encountered a number of obstacles. In particular, as noted above, a binary division into religious and secular organizations is problematic, leading recent analysts to advocate a typology that distinguishes between organizations on the basis of whether and how religion is manifest in their aims and activities.

In particular, Hefferan et al (2009) build on work by Sider and Unruh (2004) and others to devise a typology designed to reveal how religion is manifest how FBOs are organized and engaged in development, based on:

- An organization's self-description
- Who founded or organized the organization
- The selection criterion for leaders and managers
- The selection criterion for staff and volunteers
- Sources of financial and other support

- The organized religious practices of staff and volunteers
- The religious content of an organisation's programmes
- Whether and how religion is integrated with other programme variables
- The expected connection between religious content and the outcome of an organisation's activities
- The presence of religious symbols.

They suggest that organizations can be classified with respect to each of these dimensions, enabling the following types to be distinguished:

- faith-permeated
- faith-centred
- faith-affiliated
- faith background
- faith-secular partnership and
- secular organizations.

The typology is used to examine the characteristics of a dozen or more religious organizations engaged in development activities in Latin America and the Caribbean, and to locate them along this 'axis of faith'. They conclude that "In applying the typology....more often than not, [it] does accurately capture the ways faith and religion are manifested in goals, mission, programming, and funding of the FBOs under consideration" (Hefferan et al, 2009, p 9).

When comprehensive information on the scale and scope of the activities of non-state organizations (including religious organizations) is available, it may be possible to define criteria for selection and identify an appropriate sample of organizations for study. Even if criteria are clearly specified, however, where such information is not available, the selection of organizations for study is more arbitrary. As with any case studies, such cases provide illustrative examples, but care must be taken when comparing them and especially when attempting to generalize.

If the aim of a study is to identify whether religious organizations are distinctive, then comparisons with non-religious organizations are essential (see Appendix 1, in which the suggested research questions are based on an assumption that it is possible to distinguish between FBOs and NGOs). However, as discussed above, categorizing organizations as religious or secular is difficult, especially where most

people are adherents, and may not be an appropriate approach. Instead, it may be more appropriate to identify a sample of organizations involved in similar activities and compare

- how religion is manifest in their (and their staff and volunteers') aims, choice of activities and ways of working, and
- the outcomes of their work.

Alternatively, a sample of religious organizations involved in similar activities (e.g. education) can be compared to ascertain whether and why they achieve outcomes considered important to wider development objectives e.g. increasing gender equality, reaching the poor.

The suggested research questions set out in the appendix are suitable for a comparative study of a number of organizations. However, a case study of a single organization can also be informative for the organization itself or for a potential development partner or funder. For example, questions that might be posed during research to assess what difference faith makes to the work of an organization are set out in Box 27.

## Box 27: Does faith make a difference? An organizational case study

A study of how religion is manifest in the activities of an organization can, Aiken suggests, help an FBO to clarify its faith identity, and enable it to reinforce the advantages and mitigate the risks of integrating religion into its development activities.

**Aim:** to establish the impact of religion on the practice of an organization by exploring the extent to which it:

- *Impacts upon organizational culture:* How does religion influence the motivation of an organization's founder, staff, volunteers and users? How is religion integrated into its daily routine? How does it influence decision-making and practices in the organization?
- *Influences how development is defined:* how does religion influence the organization's understanding of development?
- *Informs programme design and implementation:* how does faith influence programme design and implementation, including the choice of activities, beneficiaries, locations and partners?
- *Informs interactions with the wider community* (beneficiaries and non-beneficiaries): how has the community changed in which an organization operates changed since it started operations?

Such a case study can be based on semi-structured interviews and informal conversations with a selection of informants expected to have the greatest insight into the research questions, including staff and community members, as well as review of documentary materials and observation of organizational routines and programmes.

Source: Aiken, 2010.

## Notes

- <sup>1</sup> See also Human Development and Capability Association <http://www.capabilityapproach.com/index.php>
- <sup>2</sup> See [www.welldev.org](http://www.welldev.org) for publications from the Wellbeing and Development research programme at the University of Bath, including work on a methodological approach to analyzing wellbeing.
- <sup>3</sup> [www.wvsevsdb.com/wvs/WVSanalyze.jsp](http://www.wvsevsdb.com/wvs/WVSanalyze.jsp) . Note that attendance at religious services does not have the same significance in every religious tradition, and that expectations for public engagement in religious rituals varies between men and women (for example in Islam). The available data are not disaggregated by sex.
- <sup>4</sup> Ethics also refers to the branch of philosophy that studies questions about morality, in principle or in practice (applied ethics).
- <sup>5</sup> Punishments for five specific crimes: unlawful intercourse, false accusation of unlawful intercourse, consumption of alcohol, theft and highway robbery.
- <sup>6</sup> There are elaborate statistical rules and procedures for determining an appropriate sample size, the selection of respondents, and whether and how generalizations can be made from a sample.
- <sup>7</sup> As do the World Values Surveys, see Halman, 2002.

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# Appendix 1

## Comparing religious and secular non-governmental organizations in development

**Aim:** To identify whether and in what circumstances FBOs make a distinctive contribution to the achievement of development objectives.

### Research questions

**1: What development organizations operate in one or more selected geographical areas, what is their history, how are they influenced by the changing contexts at local, national and international levels, and how do they relate to governmental and other organizations?**

No	Questions	Source of Information
1	What is the socio-economic profile of this local government area with respect to: population, religious composition, livelihood patterns, health status, education (adult literacy, level of education achieved, proportion of children attending school), occupational structure and employment status, HIV/AIDS prevalence, life expectancy, infant and maternal mortality,	Central and local government officials in the local government area (LGA), especially the development planning officer; relevant local government reports,
2	What natural resources are available and used, and what environmental challenges occur e.g. desert encroachment,	Government officials, relevant reports
3	What types of non-state organizations are present in the area, including civil society organizations, community based and informal groups, churches and mosques etc? What have the main trends been in the last 10-20 years e.g. emergence of new religious movements/ denominations/congregations?	Community development officer (CDO), existing studies
4	Which types of organizations are involved in development activities in this LGA? What are the names of the main organizations and what are their activities? How numerous and significant are small organizations?	CDO, Directory, leaflets from civil society organizations (CSOs), relevant reports
5	What have been the main objectives and content of development policy in the LGA in the last 10-20 years? What explains any changes?	Development planning officer, local development plans

No	Questions	Source of Information
6	How would you define 'FBO' and 'NGO' in the context of this area? To what religions and sects/denominations do the FBOs belong?	Relevant government officials, especially CDO.
7	What are the factors influencing the emergence of NGOs and FBOs in this area, and what is their relative importance?	CDO, relevant studies
8	In what sectors of development are NGOs and FBOs active?	CDO and relevant reports
9	When did they start their work in this area, and how has it changed? How is it distributed, in particular between urban and rural areas, and has this changed?	CDO and relevant LGA reports
10	How do you judge if an organization is performing well?	CDO
11	In what ways do the different FBOs and NGOs contribute to development in the LGA, and how has the nature of different FBO and NGO contributions to development changed over the last 20-30 years? Why?	CDO and relevant LGA reports
12	What kind of relationships currently exist between NGOs/FBOs and the local government, particularly with respect to registration, funding and choice of activities (e.g. providing funds, collaboration, partnership, conflict, co-existence with little contact)?	CDO, other government officials, politicians, representatives of CSOs, relevant reports

**2: What differences and similarities exist in the development aims, values, activities, and organizational characteristics of the religious and secular non-governmental organizations under study?**

No	Questions	Source of Information
	<b>Development aims</b>	
1	What is the goal and objectives of your organization?	Staff members/document
2	What constitutes 'development' for your organization?	As above
3	What is the mission of your organization?	As above
4	Why did your organization decide to pursue its chosen objectives?	As above
5	Who are the intended beneficiaries of your development activities?	As above
	<b>Values</b>	
6	What motivated the founder to establish this organization?	As above
7	What are the beliefs/ideals of the organization?	As above
8	What are the core organizational values? (past and present)	As above
	<b>Activities</b>	
9	Describe the programmes and activities of your organization.	Programme Staff /documents
10	How did the programme and project ideas originate? Whose ideas were they and who developed each of them?	Programme Staff
11	What sources of information do you draw on for each activity?	Programme Staff

No	Questions	Source of Information
12	Where are the facilities or projects? Where do the programmes operate?	Programme Staff /documents
	<b>Organizational Characteristics</b>	
13	What date was your organization established?	Human resources (HR) Staff /document
14	What is your organization's legal status? Is it registered? Where and as what type of organisation?	HR Staff /document
15	Describe the organizational structure. What types of staff do you employ and how many in each category? How many members and/or volunteers do you have? What is the gender composition of your staff, members and volunteers?	HR Staff /document
16	Describe the management pattern of the organization. Prompt about the existence and roles of committees.	Finance Staff/document
17	How are the staff recruited? (prompt whether on the basis of religion, differentiating by level of seniority/type)?	HR Staff /document
18	Does the organization have a Board (e.g. of trustees)? What is its composition? Who appoints members? Describe the decision making process of the organization. What are the roles of senior and junior staff and board members in decision-making?	Board members, Executive Director, Programme Staff
18	Describe the communication pattern in your organization.	HR Staff /document
19	How do you manage funds in the organization?	Finance Staff/document
20	What is the total budget of your organization?	Finance Staff/document
21	How do you raise funds for your activities? Prompt on proportion from various sources	Finance Staff/document

<b>No</b>	<b>Questions</b>	<b>Source of Information</b>
22	Does government fund your projects?	Finance Staff/document
23	Do you have formal and/or informal links with other organizations, locally or elsewhere? If yes, describe	Programme Staff
24	Do you have partnerships with other organizations for any of your programmes? If yes, describe	Programme Staff
25	Do you have partnerships with government for any of your programmes? If yes, describe	Programme Staff



**3: How does faith manifest itself in the organizations under study?**

No	Questions	Source of Information
1	How does the organization describe what it stands for, officially and in your view?	Staff members, mission statement, other documents
2	What is the religion of the founder (s)? In what ways did faith affect the founding of the organization?	Founder or his/her representative/ document
3	What is the religion of the organisation's Board members? Does religion play any role in their selection? Does it influence their decisions/advice and if so how?	Senior managers, Board members
4	What is the religion of the organization's senior managers and what role does religion play in their recruitment and promotion?	Member of senior management/ document
5	What is the religion of the organization's staff and volunteers and what role does faith play in their recruitment and promotion?	Senior manager, HR Staff member, programme officers
6	What role does religion play in the source of funds and their utilization in the organization?	Senior manager, Programme officer/document
7	What aspect of religious practices are staff members involved with in the course of their work?	Programme officers
8	Describe the extent to which religious content is integrated into the programme activities of the organization.	Programme officer, documents
9	If faith is integrated in the activity of the organization, in what ways does it influence programme outcomes?	Programme officers
10	Which faith symbols are used in the organisation and how are they used e.g. for visual identity, in the course of work of the staff?	Programme officers

**4: Do FBOs approach development at community or facility level any differently from their secular counterparts?**

No	Questions	Source of Information	Method
1	Describe how FBOs generally undertake their development projects in the community/facility, distinguishing between religions and denominations.	Beneficiaries, community leaders, LG staff, documents	KII, FGD (focus group discussion)
2	Describe how secular NGOs generally undertake their development projects in the community/facility.	Beneficiaries, community leaders, LG staff, document	As above
3	From your perception, what are the differences in the approach to development work and service delivery taken by NGOs and FBOs?	Beneficiaries, community leaders, LG staff, document	As above

**5: What are the actual/perceived performance outcomes of the FBOs and NGOs under study?**

No	Questions	Source of Information	Method
1	Does your organization monitor and evaluate the results of its activities? If so, how? Who does it report the results to? For what purpose? (distinguish between inputs, progress towards targets, results, outcomes and impacts)	Senior manager, programme officers, funding organizations	Key informant interview (KII), periodic progress reports, evaluation studies
2	How would you define 'performance' or 'effectiveness' for FBOs/NGOs?	Beneficiaries, FBO/NGO staff	KII, FGD
3	Identify what you consider to be appropriate specific indicators of performance for FBOs/NGOs?	As above	As above
4	How would you describe the performance of this organization?	As above	As above

No	Questions	Source of Information	Method
5	Describe the ways in which this organization assists development in this community. Are these different from other FBOs and NGOs working in the same sector in this community?	As above	As above
6	How would you describe the outcome of the activities of this organization carries out for its beneficiaries?	As above	As above
7	How would you describe the quality of service that this organization delivers? Prompt: on ability to meet client needs, perceived barriers to use, organization of the service, length of waiting time and cost of the service.	As above	As above
8	Do you think that local residents have a sense of ownership of the services that this organization provides? (prompt for participation, sustainability, and accountability)?	As above	As above
8	What has changed in your life as a result of working for this organization? (why?)	Staff	Interview
9	Do you receive feedback about your work from beneficiaries and other local residents? (if yes, what specific feedback have you received?)	Staff NGO staff	Interview

**6: What explains the similarities and differences in performance outcomes of FBOs and secular NGOs?**

No	Questions	Source of Information	Method
1	Are there differences in the performance outcomes of this organization when compared to others working in this sector in this locality? (if yes, describe the differences)	Beneficiaries, FBO/NGO staff	FGDs, Interview
2	If yes, what are the reasons?	As above	As above

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