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Contents

Note from the Editor: Middle Class in Bangladesh

Planning for Blended Pedagogies: Appropriateness for Modern Transformation in the 21st Century
Tlou Ramoroka, Johannes Tsheola, and Mokoko Sebola

Disability Benefits Payable by Retirement Funds under the South African Law
Lufuno Nevondwe, Kola O Odeku, and Konanani Raligilia

Livelihood Resilience and Diversity in the Face of Socio-economic Challenges: Exploring the Experiences of Urban Youth in Harare (Zimbabwe)
Clement Chipenda

Sustainability of Rural Entrepreneurship as a Livelihood Strategy in Zaka District, Zimbabwe
Gerald Guta, George Vhudzi, and Bernard Chazovachii

Afrophobia in South Africa: A General Perspective of Xenophobia
Malesela J Masenya

Xenophobic Attitudes Against Immigrants and Cheap Political Talks: Sitting Time Bombs and Explosives in South Africa
Mokoko Piet Sebola

Television News Coverage and Xenophobic Attacks on Foreign Africans in South Africa: A Content Analysis of Youtube Videos
Okorie Nelson and Abiodun Salawu

Continued on next the page
<table>
<thead>
<tr>
<th>Title</th>
<th>Authors</th>
<th>Pages</th>
</tr>
</thead>
<tbody>
<tr>
<td>The OBC Muslims: Some Little Known Marginal Communities of West Bengal, India</td>
<td>MD. Intekhab Hossain and Syed Abul Hafiz Moinuddin</td>
<td>117</td>
</tr>
<tr>
<td>Education and Socio-economic Marginalization of Muslim Women: A Case Study of North 24-Parganas District in West Bengal</td>
<td>Notan Bhusan Kar and Bhola Nath Ghosh</td>
<td>129</td>
</tr>
<tr>
<td>Religious Pluralism among the Muslims: A Case Study of Hussain Dighi of Uttar Dinajpur District of West Bengal, India</td>
<td>Hasibul Rahaman</td>
<td>150</td>
</tr>
</tbody>
</table>

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Note from the Editor

Middle Class in Bangladesh

1

Not much is available by way of serious research on the nature, composition or even the definition of the middle class in Bangladesh. But the importance of research on the middle class in Bangladesh has been keenly felt by some sociologists, chiefly among them was a senior friend and colleague, Professor Bazlul Mobin Chowdhury, the Former Vice Chancellor of the Independent University, Bangladesh (IUB), who passed away on December 30, 2010. His reason was simple: the middle class that we knew and were a part of has changed radically and we must document this. During his last days he was planning a research project with some of us but we never got to the real work.

Recently, in relation to another issue, that of where in the social hierarchy can we place the poor after they graduate from poverty, that I got an opportunity to look at the literature on the middle class, the result of which is an article on the middle class and the World Bank published in the Bangladesh e-Journal of Sociology (Volume 11, No. 2). But the question of Bangladeshi middle class remains unresolved. I have hinted at the current situation in the article, but obviously, much research is needed there.

One of the very basic issues that I had occasion to discuss with Professor Chowdhury was when does one become a middle class person? That was the theme of the published article too. Is it through wealth or the income levels, is it education or occupation, or is it inheritance and tradition? But in most of our discussions we ended up favouring the notion that one becomes a middle class person when one acquires “middle class values” and in this he would agree with me that in Bangladesh it takes “three generations of educated-urban living” to acquire such values and traits and we would often test our hypothesis on persons and families we knew and pretty much found a strong correlation between our assumption and observations, statistically significant or not.

2

It will be difficult to define precisely what we meant by such “middle class values” but that is what the “urban educated” middle class represented until about the mid 1970s. It was a combination of certain Western values, learnt from the colonial masters, like being on time, having afternoon tea, or having read the classics in literature, able to communicate in English and refined Bengali; values and traits acquired by being in the professions requiring high level of education (like professor/teacher, doctor, lawyer, engineer etc.) or being in the government officer cadre, who were, indeed, trained to act and think in
certain ways. These were all added to the sophisticated tastes and values deemed proper for a “Bhadralok”, a genteel person, or a “Bhadra Paribar”, a genteel family, as the family had a lot to do in inculcating the middle class values.

This Bhadralok culture is similar to the upper-caste Hindu culture that originated among the educated professionals in the colonial administration and the absentee landlords residing in Calcutta (Kolkata), beginning in the early 19th century. Besides being highly educated, well read in both the local and European arts, literature and the sciences, the Bhadralok was also expected to be “modern” in attitude and, perhaps, secular in outlook. Kind of a hybrid, set between the Western, mainly English, culture and refined Hindu upper caste values. They ushered in what is often termed as the “Bengali Renaissance”. The Bhadralok or the Babu represented the middle class Bengali culture, although many of the Babus were wealthy enough to be counted among the upper class.

Somewhat contrasting to this, the Muslims from East Bengal were seen as “Bangal” meaning rustic, more as a derogatory reference to their peasant background and to distance them from the Bhadra culture of the Hindu middle class. But certain Western values and refined tastes gradually formed among the newly educated Muslims towards the end of the colonial times, particularly among the government officials. These were not much different from those of the Hindu Bhadralok and in the post colonial era (1947 onwards), these set the tone for a Bhadra Muslim family. Education in the English medium, particularly for higher education, refined language, avoidance of the local or regional dialects and accents, Western values combined with respect for local (East Bengal) culture and retaining the basic tenets of the Muslim culture, without overdoing the Muslimness, became the hallmark of the “middle class values” that we were referring to. This was distinct from the Muslim culture of North India or Pakistan, distinct enough to seek a new identity in the creation of Bangladesh, as well as different from the Hindu caste prescriptions. It was more secular and tolerant of other religions and ideas and more progressive and modern in outlook.

Urban living was a precondition in the sense that the necessary exposure to acquire these traits was available primarily in the urban centres like Dhaka or the larger district towns where many of the government officials were stationed in rotation. Also, because these towns housed the major colleges and high schools, imparting basic Western education. And to a far lesser extent than the Hindu Bhadralok culture, this culture also permeated to the village level, among the few educated families there as most urban educated people retained some contact with their rural homes for a couple of generations at least. But a clear cut distinction was made between the traditional rural and modern urban cultural values. Often a derogatory term “Khat”, meaning farm, was used to identify the ones fresh from the rural areas, or retaining of rural values and traditions, almost in the same manner as the Hindu Bhadralok would use the term “Bangal”. Professor Chowdhury was particularly offended by another derogatory term used to
identify those from the more remote parts as “Mofossil”, meaning from backwaters, or “mofo” for short, backward, incapable of change or progress.

So that, just by acquiring wealth or income, or even an education, one did not automatically turn into an “urban educated middle class” person, since one might retain much of the rural traits, remain a “Khat” or “mofo” for a considerable amount of time, incapable of changing or acquiring the said middle class values. It was in a study1 of mine in the 1970s, where I concluded that it is the third generation of education and urban living that turns one into a fully urbane person, rids one of the traces of “mofo” or “khat” elements. I argued the same for the middle class values as well, that just by living in an urban centre, or acquiring the wealth or income, or even education does not make one a middle class person.

3

The origin of this middle class we were referring to can be traced to the late nineteenth and early decades of the twentieth century when some well to do Muslim peasants began sending their children to schools and by the 1950s and 1960s (third generation) this became the dominant class in the Bangladeshi society and was largely responsible for the independence movement of the country. They were educated in similar schools and colleges, set up by the colonial administration and often privately funded by Hindu landlords, and eventually some went to the only university in the country, the University of Dhaka (the earlier lot went to the University of Calcutta). Education remained for them the only vehicle for upward mobility as it secured for them the government jobs and other professions like law and teaching, and to a lesser extent medicine, engineering etc. Whatever little business was done by the Bangladeshi people during these days did not usually qualify one to the status of “educated middle class” as business was considered to be a lowly job (similar to the status given to it by the Hindu Bhadralok, who considered the business people as representing a lower caste), although officials in banking and insurance, largely because of their education and shared values, often qualified.

But after the independence of the country, in 1971, the scenario altered rapidly. A number of changes took place almost simultaneously, considered in the historical time period, that, I presume, distorted the composition and the character of the middle class substantially, if not radically. First, the middle class of the 1960s was suddenly at the helm of state authority. Initially the Awami League, with one foot still in the villages, and later the military, a somewhat more Westernized group in its attitude and more urban in character, with its supporting civil bureaucracy, attained control over the economy and the polity. Through a process of nationalization and then privatization of the industries and commercial enterprises that were state owned or left behind by the West Pakistanis, a portion of the middle class began to transform itself

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into a new group of “moneyed” men discarding their middle class post. Hence, a section of this middle class with access to the state power, directly or indirectly through association, acquired resources, including disinvested factories and businesses, to propel them to the “upper class” in terms of wealth and control over state power. Over the next few decades they have only consolidated their class position further and, along with a hoard of other new entrants, are on their way to crystallizing as an “Upper Class” proper.

It may be noted here that in the pre-independence Bangladesh there really was not much of an “upper class” in Bangladesh. A handful of “moneyed families” with investments in business and industries were known but they were not treated as an “upper class” proper nor were they given the high status or honour. The highest status/honour within the country (East Pakistan then) were accorded to the top government officials and professionals. In any case, these families owned little in comparison to the wealth of the notorious “22 families” in West Pakistan, who were seen as controlling the resources as well as the state power of the country (Pakistan) then and, therefore, the “upper class”, in reality, resided in West Pakistan.

However, the acquisition of state power has, since independence, continued to offer access to the economy, as more and more of the people close to state power, both in the urban and rural areas, change their fortunes for the better, hence the scramble to become “party workers” and so much feud within and among political parties. With each change in government a new group of people attain access to the resources of the country and a new set of people get the opportunity to change their fate. Most, if not all, of this group are fresh from the rural areas or from the lower classes but do acquire wealth in quick pace to move to the newly forming middle and upper classes. Many change their fate almost overnight and stories of “rags to riches” abound in the country. But hardly a few of these with access to the state power today are from the older middle class (except for the ones noted above), for the simple reason that the older middle class is no longer residing in the country.

Partly because of the political uncertainty, but largely because of the opportunity that presented itself and because of easy access to a passport and visa, which previously had to be gotten from West Pakistan, and the relaxing of visa restrictions in some countries like the USA, Canada and Australia, hoards of the educated urban middle class just availed the alternative to leave the country for a better life abroad. Education was the primary capital that allowed these middle class teachers, doctors, engineers and even many government officials to go for “higher studies” and then apply for residency in those countries. Anyone who could secure an admission to a university programme and some funding left the country.

But, unfortunately, few returned. In 1976 September when I left for higher education, by the only outgoing weekly BOAC flight from Dhaka, I was in company of 41 other young graduates, all newly appointed
lecturers from the three public universities, going for their PhDs. Only two, including myself, returned! And that set the tone for the next couple of decades to come, which translates into the mass exodus of the middle class I am referring to. They had the resources, skills and the often the airfare to make the trip while the opportunity itself supplied the motivation for leaving the country. And the numbers only increased exponentially as more and more relatives could be "sponsored" by the new Bangladeshi residents in those countries.

The process has not abated much and the current estimates of expatriate Bangladeshis vary between 8 and 10 million. Though a large majority of these are the lower class working people going to the Middle East and East Asia on a temporary basis, a large percentage of them are also from the dwindling old middle class residing in the USA, Canada, Australia and a host of other countries, including even in the African and Latin American countries. Today, nearly all urban-educated middle class families from the 1960s, either wholly or a substantial segment of the family, are residing in some foreign country.

Someone recently commented on a very interesting aspect of this migration. Among the lower class, the migrants leave their families in Bangladesh, increasingly in the urban centres (more about this later), and the men go to work in the Middle East or East Asian countries sending money home for maintaining the families. The opposite, seems to be true of the upper and middle class people today. The men, mostly upper class but a section of the middle class as well, including some government officials, stay and work in Bangladesh to earn and send huge amounts of money abroad to maintain their families there. A huge community of “Bangladeshi Begums” (wives) has recently been reported residing in Toronto, Canada to facilitate a richer and safer life for their children. Presence of such major clusters of Bangladeshi migrant families is also known in other major North American cities. Thus, while the poor workers earn money for the country the upper classes drain the country of that wealth!

In any case, a substantial portion of the erstwhile middle class has gone missing from the country. Many more of that group can today be found in New York, Los Angeles or Toronto area than in Dhaka city. In New York City alone the estimate of the Bangladeshi population varies from 100,000 to 200,000 of whom over 50% of the 25 years or above population have bachelor or higher degrees¹. That itself will be a group comparable in size, if not larger than the whole of the middle class population in Dhaka in the 1960s. This may sound like an exaggeration but the point is that the old urban educated middle class population of the 1960s was a small one and is largely gone today and are living abroad, taking with them those values that made them the middle class in the first place. I often feel that this exodus of the middle class is largely responsible for the absence of a strong and fully functioning “civil society” in Bangladesh today resulting in much of the crises of the society and polity over the years.

¹ Wikipedia
Of course, that does not by any chance mean that the whole of the middle class has gone missing from the country. On the contrary, the number of those belonging to the middle class, if measured by income or wealth, has only soared in the last few decades. With all kinds of businesses, industries and commercial enterprises making up a major portion of the GDP, and the access to many governmental contracts for the “party men”, the number of people with large incomes and or accumulated wealth has increased phenomenally in Dhaka and in other major cities. Along with these there is also a group, particularly from the rural families, who are educated in the newly established schools, colleges and universities, many of whom are holding urban jobs or small businesses with incomes that would put them in a middle class income bracket regardless of their education or location.

Add to these the families of “expatriate working class” who are living in the cities of Bangladesh. Many receive substantial income from the husband abroad and send their children to good schools, often to English medium schools. Also, so much “black” and ill-gotten money is in circulation that successive governments had to offer opportunities to “whiten” these. These ill-gotten fortunes have put many, often first generation urban and even uneducated ones, to not only the middle but even in the upper class brackets. If we leave out the top 10% and bottom 20% of the income earners of the country the middle 70% earn nearly two thirds of the national income\(^1\). This money has put a lot of people in the middle class bracket.

The actual numbers, or even a reasonable estimate\(^2\), would be hard to come by but they, in their millions, not necessarily in the professions like teaching, medicine, engineering or law, comprise the middle class in Bangladesh today. Many working in multinational corporations, local banks and financial institutions, managers in the numerous garment factories and their outlets, tourism and related industry, working in the arts and the media, both electronic and print, officials in the numerous NGOs and donor agencies and by far the largest group who claim to be “business men” or “entrepreneurs” including many medium to large traders, shop owners and small scale industrialists identify themselves as the middle class. Indeed, those previous professional groups would be a scant minority when compared to the vast number of “businessmen”, which was not even considered a middle class occupation earlier, and the other current managerial level occupations, so that this “new middle class” is in sharp contrast with the earlier “educated urban middle class”.

\(^1\) [http://www.indexmundi.com/facts/bangladesh/income-distribution](http://www.indexmundi.com/facts/bangladesh/income-distribution)

\(^2\) A recent BIDS study puts the number at 20% of the population with a definition that, “A person belongs to the middle-class category when his/her income ranges between $2 and $3 per day” (The Daily Star, November 06, 2015). The absurdity of such World Bank sponsored definitions has been demonstrated in the ‘middle class and the World Bank’ article noted earlier (Volume 11, Number 2, of the Bangladesh e-Journal of Sociology).
An attempt may be made here to classify these in terms of at least three categories: 1. **Middle Class of Professionals** (doctors, engineers, lawyers, artists and media personalities etc.); 2. **Salaried Middle Class** (government officials, professors, college and school teachers, executives in banks, corporations and NGOs, managers in factories and buying houses etc.); **Business Middle Class** (entrepreneurs, retailers, traders, shop owners, small scale industrialists etc.). These may be further subdivided into upper and lower middle classes depending on income and the accumulated wealth and assets and or access to the state power, for example those of the officers in the military and the police and the elected officials of all categories because of this access to power usually command greater resources. The upper or lower limits of income of this **new middle class** will be difficult to define without empirical data. The upper middle class will gradually merge with the upper class and the lower middle class will, similarly, be difficult to separate from the working class, if such a class can be distinguished from the lower class. Even street vendors or taxi drivers are known to have incomes higher than school teachers and low level executives. Hence, income or wealth in this fast changing scenario is more likely to complicate rather than define the issue.

As I pointed out above, this new middle class is largely first generation urban as is noted from the phenomenal growth of the urban population in the last few decades. Population of Dhaka city quadrupled in the past 25 years. Most among these are also first generation educated. Likewise, most government officials are also first generation urban, as was also true of earlier times, but many of these are first generation educated too. Although they do get trained like in the old days, they are no longer the torch bearers of the middle class values. A substantial number of the second generation urban and educated would surely be among this middle class but it will be hard to get, in any sizable number or percentage, the third generation educated-urban among this huge lot. These new entrants to the middle class, the first and second generation urban and educated, some not even educated, are the ones we, Professor Chowdhury and I, used to refer to as NOT belonging to the middle class, they are yet to acquire the middle class values that we set as the basis of entry into the middle class.

Ironically, though, many of these second generation, even first generation, urban or educated ones, largely because of abundant disposable income, have either lived abroad for a while or have visited relatives abroad and/or visited other countries as tourists and may actually be well versed in this or that aspect of the Western or other cultures. Indeed, much more so than the middle class of the 60’s had access to. And thanks to the phenomenal expansion of the media and the internet, they are, perhaps, far better acquainted with the world today than any one from the 60s. Yet, and these are my personal views (and those of late professor Chowdhury), they are not sophisticated enough or have acquired, or inherited, the middle class values, though some may actually overdo certain aspects of it.

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1 Many doctors and engineers are also found in salaried government jobs
Language is the most important element of a culture and the use of sophisticated language formed a much noted aspect of the middle class values but the language most of these new middle class speak today is just a variant of the heavily accented localized Bangla they used to speak in their rural homes and not the standard (promito) Bangla used in the '60s. Even if you walk the corridors of the University of Dhaka your hearing senses will be affronted by dialects of unidentifiable varieties, spoken very loudly and fast paced. In a majority of the class rooms, including the humanities and social sciences, district, or sub-district level variety of accented Bangla and not English is the unofficial medium of instruction in all public and many private universities. Language spoken on the streets is another matter, I often feel that I am in a different country hardly able to follow the language some people speak.

Thanks to the assault of the Indian media, Hindi is understood and even spoken by some, particularly among the upper class-and upper middle class who invite Indian cultural personalities to their homes for exclusive renditions and communicate with them in Hindi, thereby announcing to the world of their cultural “sophistication”. Children, thoroughly exposed to the Indian media, freely mix Hindi with Bangla and the English they learn in English medium schools. In a recent review of job applications of nearly 500 candidates I noted at least 70% of the applicants voluntarily put Hindi as the third language in the language proficiency column in their CV, even though no language proficiency was asked for. And the students of Dhaka University laid their lives fighting against Urdu in this country!

Contrast this with the knowledge of English language. There are today two groups among the educated section, one, by far the larger group, from the Bengali medium of instruction in schools through university with very poor knowledge of English and the other from the English medium schools with heavily accented, often incorrect, usage of the language, but spoken fluently, and solely in most cases, even at home. For those from the Bangla medium the world of higher learning is practically closed. A few do read Bangla fiction of the popular kind but that’s about all of their readings since they cannot read English, even if they have access to, as in the huge collection of English books in the university libraries, but also because there is very little of anything available outside of fiction in Bangla language.

However, being educated has little to do with the command over English. In my experience in class room after class room, both in public and private universities, I found hardly any student who reads a story book, let alone anything else! Reading is rarely taken up later in life amid the struggle for survival. Bookstores, if they are any indication of education, are a rare sight even in Dhaka city and those which do exist do highly profitable business in poor quality “note books” and photo copies of text books, but nothing beyond. One may find a few copies of popular fiction in the used book stores, left behind by “foreigners”, but of the sciences, arts and literature, philosophy, history, or politics and economy, sociology or psychology are simply non-existent. So that my acceptance of an educated person as “one who knows
everything from Plato to Pluto”, is a far cry in this veritable abode of ignorance. One may have heard of Pluto from the media but definitely not read Plato these days.

There are currently over one hundred and forty universities in the country and more than half of them are situated in Dhaka, including more than one university in one building or more than half a dozen on one street. Most of these are privately funded and attract students of the upper and middle class families. Other than a few specializing in engineering or medicine, all the rest of the 100 or so private universities teach “business” to the larger majority of the students. The business majors in these private universities often exceed 80% of the total enrolled students. Let alone the arts, even the basic sciences are not taught in any of these private universities because they are not revenue earning subjects. Most of these private universities have some “general education” courses to cover the sciences and language or literature but students just need to pass a few courses in these. They are not required to attain any knowledge of these subjects, because they will all be seeking jobs in business organizations like the banks, where they, supposedly, do not require the knowledge of the arts and the sciences! Contrast this with the study of business subject in the past, up to the 1970s, when only a few less meritorious students, who could not qualify for the science group or the arts group, would be asked read these subjects. University of Dhaka would admit only about 30 students a year to the Department of Commerce!

Public universities do teach the sciences and the arts and a few students try to get a good education but by and large, education today has become degree (diploma) oriented and their lack of knowledge of English severely curtails their genuine interest in learning. Recently I sat in an oral examination of over 200 Sociology Master’s students and asked them what books they had read as a prelude to further questions. To my horror, all, including the “best” of the students, shamelessly confessed that they had not read a single book (in all their Bachelor’s and Master’s years), largely because they cannot read English books and almost all sociology books available in the library are in English. They read the short handouts given by their teachers or “notes”, originally compiled by students ages ago and later shabbily translated into Bengali, handed down through the generations. The situation is not very much different in other disciplines either. That is the limit of education for most students in both public and private universities today. You just need to pass and who needs books for that!

You need to pass to get a degree and you need a degree to get a job. Unfortunately the job market is very restricted for these students from the public universities. Other than the few good ones who aspire to and finally go abroad or get a job in teaching due largely to their personal initiative or ingenuity, including establishing personal alliances with the power on campus, the rest have just one job opening, that of the government jobs. Many of the better or higher paying jobs in the private sector these days require the knowledge of English and they cannot compete for these with the students from the English medium private universities. The other way to get access to a good job would be “connections” in the job market,
which they also lack as most are fresh from the rural areas and/or belong to the lower middle or lower class.

And this is very important for us here. Although it is tricky to demarcate the classes in the absence of a proper study, it is not too difficult to see that there has been a visible shift in the class locations of the students of the public universities vis-à-vis the private universities. To avoid the numerous problems plaguing the public universities, including, though not limited to political troubles, which translate into long periods for graduation, many middle class (call them upper middle class, if you like) and most upper class students enroll in private universities. This is also because they can afford the very high tuition and fees and is often seen as an alternative to studying abroad, particularly for the girls. Many of these students had previously gone to the English medium schools where high tuition is also the cutting point. On the other hand, the majority of the students in the public universities are either from the lower middle class or lower class backgrounds. A considerable number of boys and girls from the middle and upper classes, particularly the ones from the English medium schools, do go abroad for higher studies too. The ones of the lower classes have to depend on a handful of scholarships, which are difficult to come by especially in the absence of “connections”. These distinctions result in continued separation in the job market as noted above. So that we have an upper middle class in private universities with only business education and a lower middle class in public universities with a diploma earning education and getting muddled in politics, both totally lacking in the kind of education that used to shape the middle class values in the earlier days.

7

Of the middle class values, being secular and modern in outlook, with tolerance for other ideas and ideologies, is paramount. Being Muslim was a defining character of the old middle class values in Bangladesh and one’s religiousness was never in doubt, nor did one question another. The regiosity of the new middle class today, if anything, appears to be stronger both in beliefs and ritualistic expressions and definitely there are many more devout ones now as mosques overflow to the streets during Friday prayers. This is further witnessed in the dress patterns of women as more and more of them are found taking up the all covering Burka or Hijab. The numbers would be as high as 50% percent or more of the women present in a given location.

The old middle class men used to dress in slacks and shirts as a regular day to day wear and often Panjabi and Pajama, particularly on cultural and religious occasions, while lungi and vest at home was the norm. Suit or blazer was rarely worn and only on selected occasions by a very few. But the new middle class, keeping in tune with the global trends appear to be more comfortable in blue jeans and T-shirts on all informal occasions. Formal dresses, particularly at the executive levels include suits or blazers with tie on shirts and slacks. For the youth, jeans seem to be the preferred dress for all occasions. Middle class women always dressed in moderate sophistication, mostly Shari even at the college and
university levels and definitely after marriage while at younger age they would wear _Shalwar_ and _Kameez_. On the other end, among the upper-middle class and the upper class proper, slacks, blue jeans, Western skirts and T-shirts or tank tops are not uncommon either. However, by and large the new middle class women, young and old, wear the North Indian or Pakistani style of _Shalwar_ and _Kameez_, often competing for the latest in Bollywood fashion, and colour their hair in the various hues of red, hence, gone are the days of _Shari_ and black hair, about which poems and songs were composed.

Besides refined language, a few other items like music and songs, particularly Tagore songs, became the identifying mark of the Bengaliness of the middle class culture. Indeed, Tagore songs became the rallying focus for the independence movement. Listening to the request programmes for songs on Dhaka and Kolkata radio stations formed a part of the daily routine in the pre-liberation days. Hindi songs from India and Urdu movies from West Pakistan were for the lower class, rickshaw pullers etc. not up to the middle class taste. Bengali movies from Dhaka studio and Kolkata (until they were banned after 1965 war with India) formed a regular part of the entertainment calendar along with English movies both from USA and UK which were released in Dhaka simultaneously with other major world cites. Staging drama and holding cultural functions on major occasions like the Bengali New Year or 21st February was a common feature in all parts of the city, with communities vying with each other for better presentation. “Community Halls”, constructed in every locality, housed these functions. Being members of a sporting or cultural club and or community library was an essential part of the middle class youth culture.

Few today have any connection with these activities. Sports is off the table as far as the Dhaka city youth are concerned for the simple reason that there are literally no play grounds for games. The national cricket team is largely composed of players from outside of Dhaka whereas in the past cricket used to be played and was popularized in Bangladesh primarily by the middle class youth of Dhaka city. Movie going is highly restricted to a few selected places for the middle class with hardly any Bangla movie on show. Hindi movies and Hindi serials on television have captured the new middle class audience of Bangladesh today, as have the Hindi songs and Bollywood style dancing in wedding parties. For the upper middle class and upper class, hosting an Indian celebrity singer or dancer or attending functions by one such “Star” in the posh hotels is a mark of “class”. Similarly celebration of the New Year on the midnight of 31st December or Valentine’s Day rivals the celebrations of Bengali New year and Pohela Falgun (1st day of spring). These celebrations become so rowdy, including incidences of sexual assault, that the government has been forced to ban outdoor programmes after dark on the New Year’s eve in Dhaka and restrict movement to and from the the upper class residential areas and the diplomatic enclave. It is today difficult to find the Bengaliness of the culture or the values of the middle class in any of these.
Yet, the middle class life flourishes in Dhaka as elsewhere in the country. There are many times more to be placed in this social category than would have been possible a couple of decades ago. They do follow a lifestyle far richer than most of the middle class of the earlier days. They have more disposable income than was possible earlier; lots of people have lots of money, often ill gotten or black money. Practically all who could be in a middle class bracket possess material goods like, TV, freeze, computers or top of the line cell phones, tablets and laptops. Owning a radio was the limit in most homes in the 1960s. But many today own cars and “luxurious” apartments and a large number send their children to the hundreds of costly English medium schools all across the country, in the 1960 there were only half a dozen English medium schools in Dhaka and Chittagong with tuition comparable to the Bengali medium institutions. Eating out with family and friends is a regular part of their life as is the shopping spree during the festivals. Many spend holidays abroad, at the very least go to the Cox’s Bazaar beach. Dance parties and hanging out with friends in costly restaurants or spending hours on the cell phones and on the “Face Book” are what defines the young of this middle class today. So that in terms of the middle class lifestyles they are not very far from other middle classes in other countries. Yet, some crucial ingredients seem to be missing.

The middle class values, of being modern and secular, and of being tolerant of other ideas and ideologies, of being “educated” or the culture of education, of the sophistication that comes with knowledge and simple living, of the language that is spoken with clarity, of the culture that one takes pride in, of the heritage that matures after many generations are missing from most. In place of the “educated urban middle class” today we have a middle class that is hardly educated and largely rural in character. Essentially, it is the rural middle class that has taken up residence in the urban centers.

Yet, the number of theater goers is on the rise and the crowd at the classical music or Rabindra Shangeet renditions grows larger. Art galleries do fill up, though with the nouveau riche mostly, while younger generations do return after completing their studies abroad. And, perhaps, they are all writing a new chapter of values for this “new middle class”. The old values we, Late Professor Chowdhury and I, thought one acquired only after three generations to become middle class, may now be obsolete, as is true of that old middle class itself.

Nazrul Islam

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1 National Board of Revenue (NBR) reports that the professionals, primarily the doctors, lawyers and high school teachers are the greatest dodgers of taxes as they do not report their true income. See [http://www.bd-pratidin.com/last-page/2016/11/06/182617](http://www.bd-pratidin.com/last-page/2016/11/06/182617). Few, if any, in the small business bracket pay income tax and the corruption among the government officials is rampant. (Bangladesh is ranked as one of the top countries afflicted with corruption.)
Planning for Blended Pedagogies: Appropriateness for Modern Transformation in the 21st Century

Tlou Ramoroka¹, Johannes Tsheola² and Mokoko Sebola³

Abstract: Currently, development in the world is knowledge-based, largely depending on the exchange of information through Information and Communication Technology (ICT). Therefore, countries equipped with technology and knowledge find it easy to participate in the "new electronic world" and tend to be the main players in its "socio-cultural and economic developments". To participate in the global knowledge economy, it is necessary to integrate ICT in education as a basis. However, the integration of ICT in education is to a large extent, determined by the countries’ planning approaches that are assumed to be the necessary precondition for the successful implementation of the technology. Therefore, this paper hopes to uncover the appropriateness of planning approaches in various countries as per Human Development Index (HDI) groups adopted for implementation of blended pedagogies for participation in the global knowledge economy. Generally, countries in the very high and high HDI groups adopted the policy planning and analysis approach whereas those in the medium and low groups adopted a variety of approaches inclusive of collaborative and policy planning and analysis approaches. The paper concludes that the successful implementation of blended pedagogies relies on the appropriateness of the adopted planning approaches.

Keywords: planning, blended pedagogies, modern transformation

Introduction

For effective engagement in the knowledge economy and national development purposes, the most important sector that requires change is education (Button, Harrington and Belan, 2014; Wolff, Wagner, Poznanski, Schiller and Santen, 2015; Glušac, Makitan, Karuović, Radosav and Milanov, 2015; Skryabin, Zhang, Liu and Zhang, 2015; Valtonen, Kukkonen, Kontkanen, Sormunen, Dillon and Sointu, 2015). In the context of information societies, ICT is perceived as one of the most important tools in changing the

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education sector (Button et al., 2014; Skryabin et al., 2015). Therefore, many countries have implemented educational ICT related policies and also invested resources in necessary infrastructure in schools with the hope to build learners’ 21st century skills necessary for participation in the global knowledge economy (Button et al., 2014; Wolff et al., 2015; Glušac et al., 2015; Valtonen et al., 2015). The implementation of educational ICT is assumed to be helpful in increasing opportunities for teaching and learning as well as for reducing the gap between socioeconomic factors and educational system outcomes (Button et al., 2014; Wolff et al., 2015; Dolencand Aberšek, 2015; Glušac et al., 2015; Skryabin et al., 2015; Valtonen et al., 2015). Furthermore, the integration of ICT in education is capable of building talented teacher communities through which best practices and success stories can be shared and thus motivating each other and also improving the quality of education (Button et al., 2014; Skryabin et al., 2015). However, the integration of ICT in education is to a large extent, determined by the countries’ planning approaches that are assumed to be the necessary precondition for the successful implementation of the technology. Therefore, this paper hopes to uncover different planning approaches adopted in various countries and determine their appropriateness for implementation of blended pedagogies in preparation of learners for participation in the global knowledge economy.

To fulfil its purpose, this paper consists of six sections inclusive of this introduction and the conclusion. The second section provides a brief discussion of the planning approaches adopted for the implementation of blended pedagogies. The international and South Africa’s planning approaches and experiences towards the implementation of educational ICT are evaluated in sections three and four, respectively. Section five uncovers the appropriateness of the adopted planning approaches for the implementation of educational ICT in the modernized 21st century. Then the paper concludes that the successful implementation of blended pedagogies relies on the appropriateness of the adopted planning approaches.

**Generic Planning Approaches**

Planning is future-oriented, and it is based on certain norms and standards that seek to reduce future uncertainties (Tsheola, 2011). Generally, planning is defined as “a goal-oriented activity that is carried out to prepare for the performance of a given task” (Kunitz, 2015: 135). There are multiple approaches to the modern planning processes including economic planning, physical development planning, policy analysis and planning, interpretative planning and collaboration planning, among others (Dale, 2004; Mandarano, 2008; Farhoodi, Gharakhlo-N, Ghadami, and Khah, 2009; Theron, 2008, Bakhshizadeh, Hosseinpour and Pahelevanzadeh, 2011; Tsheola, 2011; Hadaya and Cassivi, 2012; Faehnle and Tyrväinen, 2013; Talpur, Napiah, Chandio. Qureshi, and Kaharo, 2014; Deng, Lin, Zhao and Wanga, 2015; Drazkiewicz, Challies and Newig 2015; Elbakidzea, Dawsonb, Anderssona, Axelssonb, Angelstama, Stjernquistb, Teitelbaumc, Schlyterb, and Thellbrod, 2015; Hossain, Scholzand Baumgart, 2015; Kunitz, 2015; Roy,
2015). In addition to the planning goals, planning activities and operational levels of planning activities are also used to classify planning with emphasis on the planning exercise design and stakeholders' professional positions and their roles in planning (Tsheola, 2011).

However, at the centre of these planning approaches, there are two broad categories of development planning namely object-centred, substantive or technical planning and process-centred, procedural, decision-centred or institution-centred planning (Dale, 2004; Bakhshizadeh et al., 2011; Tsheola, 2011). Object-centred planning is based on substance or subject matter whereas process-centred planning involves mechanism or process (Dale, 2004; Tsheola, 2011). Theron (2008) relates the object-centred and process-centred planning to blueprint nuts-and-bolts and social learning process heart-and-soul of planning, respectively. Economic planning and physical development planning approaches are categorised as object-centred planning whereas interpretative planning and collaboration planning approaches are considered as part of process-centred planning while policy analysis and planning locates its roots in both categories (Dale, 2004; Bakhshizadeh et al., 2011; Tsheola, 2011). Additionally, planning is guided by a number of principles inclusive of comprehensiveness (consideration of all important elements), efficiency (does not waste time, money and other resources), inclusiveness (all people and organizations affected have opportunities to be involved), informativeness and transparency (all stakeholders understand what they are involved in and related processes), integration (individual and short-term decisions support strategic long-term goals) as well as logic (each step leads to the next) (Farhoodi et al., 2009; Theron, 2008; Bakhshizadeh, et al., 2011; Tsheola, 2011; Hadayaand Cassivi, 2012; Faehnleand Tyrväinen, 2013; Talpuret al., 2014; Deng et al., 2015; Drazkiewicz et al., 2015).

Therefore, countries need to adopt appropriate planning approaches for the successful implementation of blended learning and thus, the succeeding two sections discusses the international and South Africa’s planning experiences, respectively. The next section discussed the international planning experiences for blended pedagogies.

**International Planning Experiences for Blended Pedagogies**

As already noted in the previous section, planning is based on certain norms and standards that seek to reduce future uncertainties therefore, multiple approaches can be adopted for the planning of blended learning in various countries. As per HDI group, planning models of various countries will be used to juxtapose the appropriateness of South Africa’s planning approaches towards blended pedagogies. To fulfil the objectives of this section, four countries are discussed across the four HDI groups: Republic of Korea with very high, Thailand with high, Zambia with medium and Kenya with low HDI, respectively.
Republic of Korea

The rapid development of ICT in Korea and its fast penetration into public and private sectors emanate from the policy initiatives by the government (Hwang, Yang and Kim, 2010; Yoo, Han and Huang, 2012; Lee and Lee, 2015; Park, Schallert, Sanders, Williams, Seo, Yu, Vogler, Song and Williamson, 2015; Webster and Son, 2015; Park, Yu and Jo, 2016). The Korean Government has adopted a three-pronged approach of intervention to rapidly develop ICT in the country. Firstly, the government has created the “right environment for the development of ICT” mainly by establishing “pro-market policies of liberalisation and privatisation of the ICT industry”. Secondly, it has intervened at the “non-market end of the supply chain” through the funding of the public internet backbone known as the Korean Information Infrastructure (KTI). Thirdly, the government has been involved at the “non-market end of the demand chain” by providing ICT training for about ten million Koreans inclusive of homemakers and those who are employed in government agencies, the army and schools (Yoo et al., 2012; Lee and Kim, 2015; Lee and Lee, 2015). The role of government initiatives in Korea has been crucial to the rapid development of ICT in general, particularly to the promotion of e-learning (Hwang et al., 2010; Park et al., 2015; Webster and Son, 2015; Park et al., 2016). The Korean government has also developed specific plans to turn the country into an “information society” within a short period (Yoo et al., 2012; Lee and Kim, 2015).

With the hope to "modernise and globalization", the Ministry of Education and Human Resources Development in the Republic of Korea made massive investments in educational ICT between 1978 and 2001. These investments were guided by “The Comprehensive Plan for Developing ICT Use in Education” and the "Brain Korea (BK21) Plan" which aimed at improving infrastructure in schools as well as providing teacher training and promoting research (Hwang et al., 2010; Lee and Lee, 2015; Park et al., 2015; Webster and Son, 2015; Park et al., 2016). The Brain Korea Plan involved a two-phase process in which the first phase (1999-2005) was considered very successful that the budget for the second phase (2006-2012) was increased (Hwang et al., 2010; Lee and Lee, 2015). The Closing the Digital Divide Act of 2000 established the Korea Agency for Digital Opportunity and Promotion (KADO) as well as the Digital Divide Committee as part of the digital divide project wherein the latter committee was responsible for facilitating community participation (Hwang et al., 2010; Lee and Lee, 2015). For the duration of the project, 500 000 primary and secondary school learners mainly from low-income families were given an opportunity to participate in extra-curriculum computer courses between the years 2000 and 2001 (Hwang et al., 2010). Additionally, 50 000 low-income learners particularly with good grades received free personal computers with a free five-year internet subscription (Hwang et al., 2010; Lee and Lee, 2015). During the same time, the government body that oversaw education in Korea changed its name from the Ministry of Education and Human Resources Development to the "Ministry of Education, Science and Technology (MEST)" in order to reflect on the growing interests in educational technology.
(MEST, 2009). The success of Korea’s ICT sector is largely due to the policy interventions that the government has adopted with the key goal being to promote universal access to technology. Thus, for development of ICT and implementation of e-learning, Korea has adopted the policy analysis and planning as well as the community development planning approaches mainly driven by the government.

**Thailand**

ICT implementation in Thailand across various sectors was formally initiated since 1992 when the government set up the National IT Committee which is a high level policy body chaired by the Prime Minister (Saekow and Samson, 2011; Khlaisangand Likhitdamrongkiat, 2015; Ninlawan, 2015; Pruet, Ang, and Farzin, 2016). One of the key responsibilities of the National IT Committee was to develop a number of policies and plans that are used as frameworks and guidelines to govern ICT development in the country (Saekow and Samson, 2011). The policies and plans include the National IT Policy called IT 2000, the second ten-year phase of national IT policy or IT 2010, the Thailand ICT Master Plan Issue 1 (2002-2006) and the Second ICT Master Plan (2009-2013). With the IT 2000, the goal of the National IT Committee was to ensure that the country utilize ICT to “achieve economic prosperity and social equity” (Saekow and Samson, 2011; Khlaisangand Likhitdamrongkiat, 2015; Ninlawan, 2015; Pruet et al., 2016). This policy had three main objectives namely: “building an equitable national information infrastructure”, “investing in human resource to accelerate the supply of ICT manpower and developing an ICT literate workforce” and “achieving good governance through the use of ICT” (Saekow and Samson, 2011; Khlaisangand Likhitdamrongkiat, 2015; Ninlawan, 2015). Although many development programs were achieved under IT 2000 policy, those concerning human resources and government sector were still incomplete. One crucial project worth mentioning is called the “Schoolnet Thailand” which was intentionally planned for empowering all schools by giving them access a large pool of online information resources and using the Internet without access charge regardless of where they are located (Saekow and Samson, 2011; Pruet et al., 2016). The implementation of “Schoolnet Thailand” resulted in several thousand schools being connected to the Internet and the initiation of programmes and activities necessary to promote the use of technology for teaching and learning.

The IT 2010 was established in order to exploit the benefits of ICT necessary to move Thailand to the “knowledge-based society and economy”. The development focused on the good use of ICT that would drive overall national economic and social development by “building human capital”, “promoting innovation”, and “investing in information infrastructure meant to promote the information industry” (Saekow and Samson, 2011). To achieve these goals, five main flagships were identified which included “e-Society”, “e-Government”, “e-Commerce”, “e-Industries”, and “e-Education” (Saekow and Samson, 2011; Khlaisangand Likhitdamrongkiat, 2015; Ninlawan, 2015). The e-Education flagship covered issues concerning life-long learning, computer literacy, human resource development, virtual education as well
as creation of useful information, contents and knowledge, among others (Saekow and Samson, 2011). As a result of some of its unfulfilled objectives, the IT 2010 plan bore the Thailand ICT Master Plan Issue 1 (2002-2006) wherein the latter hoped to close the digital divide, continuously develop human capacity and link policy with practice. Additionally, the Second ICT Master Plan (2009-2013) which is both a tool and an opportunity for increasing the competitiveness of Thailand was developed by the National IT Committee (Saekow and Samson, 2011; Khlaissangand Likhitdamrongkliat, 2015; Ninlawan, 2015; Pruet et al., 2016). Its focus was on “developing ICT human resources;” “developing high speed ICT networks”; and “developing good governance frameworks” for national ICT inclusive of e-learning in the country (Saekowan and Samson, 2011; Ninlawan, 2015). Additionally, as part of the One Tablet per Child Policy of 2012, the Ministry of Education has distributed 800 000 Tablet computers to learners which are installed with a range of learning contents (Ninlawan, 2015; Pruet et al., 2016). The content in the Tablets is meant to develop learners’ creativity and innovation abilities in an attempt to build their 21st century skills. Therefore, from the country’s ICT planning experiences, it is clear that Thailand has adopted policy analysis and planning approach which in this case gives the state planning control of educational ICT over other institutions in the country.

Zambia

The National e-Learning Strategic Plan that has been developed by the Ministry of Education promotes the development of an ICT infrastructure in technical and vocational education and training (TEVET) institutions (Ministry of Education, 2010; Haßler, Hennessy and Lubasi, 2011; Haßler, Hennessy, Lord, Cross, Jackson and Simpson, 2011; Annie, Ndlovu and Kasonde-Ng’andu, 2015). The plan outlines a number of objectives inclusive of making ICT infrastructure available and fully integrated and effectively functional throughout Zambia, the application of e-learning in all learning and socio-economic activities as well as the government’s explicit commitment to the establishment of e-learning throughout the country (Ministry of Education, 2010). To practically realise the objectives, the Zambian government together with international stakeholders such as the Asian Development Bank, Malawi Innovation Challenge Fund and Endeva, among others, initiated the iSchool project which delivers the Zambian National Curriculum online with the hope change the teaching methods that are used in schools by delivering exciting and hands-on knowledge acquisition to learners, regardless of their age, ability and location as well as providing necessary teachers’ training (Haßler, Hennessy and Lubasi, 2011; Haßler, Hennessy and Lord, et al., 2011). The project uses interactive e-learning that relies on ICT as a delivery mode in order to enhance productivity of the country’s workforce and thus provide computers, netbooks and/or Tablets as well as Internet connectivity to selected schools (Haßler, Hennessy and Lubasi, 2011; Haßler, Hennessy and Lord, et al., 2011). Despite that the country had developed its own National e-Learning Strategic Plan to respond to the needs of the 21st century learners, collaborative planning approach has been
adopted for the delivery of e-learning infrastructure and the development of skills among teachers and learners.

Kenya

Various legislation in Kenya inclusive of the Science and Technology Act, Cap. 250 of 1977, the Broadcasting Corporation Act of 1988 and the Communications Act of 1998 consider ICT adoption for national development (Ministry of Information and Communications, 2006). In response to the legislation, the New Partnership for Africa’s Development e-Africa Commission has been implementing the New Partnership for Africa’s Development (NEPAD) e-School project since 2003 in 17 African countries including Kenya, among others (NEPAD e-Africa Commission, 2009; Onderi, Ajowiaand Malala, 2013; Nyagowa, Ochollaand Mutula, 2014). The initiative provides a framework and a systematic approach for ICT integration in education on the African continent. The objectives of the e-School initiative are to “impart ICT skills to students in order to enable them to participate in the knowledge society, enhance teachers’ capacities through the use of ICT in teaching, and improve school management and increase access to education” (NEPAD E-Africa Commission, 2009 cited in Nyagowa et al., 2014: 236). Through this initiative, NEPAD estimated that by 2008 and 2013, all youth who completes their studies from an African high school and primary school respectively, would be ICT literate (Onderi et al., 2013; Nyagowa et al., 2014). The common ideological framework behind the deployment of e-learning in Kenya is to “increase productivity in schools, impart teamwork skills and lifelong learning habits among learners and deal with the dual task of both increasing access to school and improving quality of teaching” (Nyagowa et al., 2014: 236). To realise the goals set by the National ICT Policy multiple stakeholders inclusive of the private sector headed by the Ministry of Education, Science and Technology as well as the NEPAD e-Africa Commission collectively planned for the implementation of blended learning within various educational institutions (MOESand T, 2004; Onderi et al., 2013). Therefore, for planning of blended learning, Kenya has adopted both collaborative as well as policy and analysis planning approaches.

Republic of Korea’s adoption of policy analysis and planning approach suggests that most countries in the very high HDI group would probably adopt the same approach for planning of the implementation and adoption of blended learning. Thailand’s experiences points out that for countries in the high HDI group, policy analysis and planning is adopted as the most common approach towards the implementation of blended learning. The planning approaches adopted by the countries in this HDI group are similar to the one embraced by very high HDI countries which are both categorized as developed countries. For Zambia, perhaps the adoption of collaborative planning especially with international organizations suggest that the country accepts that it needs support for the successful implementation of blended learning. As a developing country, it also need to learn from developed countries hence the partnership with well-developed and established organizations. Lessons can be drawn from the Kenyan planning
experience that given the country’s level of development, partnerships especially from organizations of
developed countries, are needed for their guidance and sharing of experiences of planning for successful
implementation of blended learning. Thus, developing countries adopt a variety of models for the
governance of successful implementation of blended learning which is an expectation for South Africa
too. In the succeeding section, the national planning approaches adopted by South Africa for the
development of 21st century skills within the society are discussed.

South Africa’s National Planning Approaches towards Building a Knowledge Society

For a country that strive to be “globally competitive”, an effective ICT system is required which is
characterised by infrastructure that provides the backbone to a “modern economy” and its connections to
the “global economy” (National Planning Commission (NPC), 2012). Thabo Mbeki, the former president of
South Africa has emphasized the importance and contribution of ICT in social and economic development
at a number of the country’s and international fora. He declared that “We must continue the fight for
liberation against poverty, against under-development, against marginalisation” and “… information and
communication technology … is a critically important tool in that struggle” (Imbizo for African Youth, 2001
cited in Department of Education, 2004). Therefore, appropriate planning approaches are needed for a
country like South Africa to use ICT to liberate itself against poverty and inequality and under-
development.

Currently, the growth of wealth in the world’s largest and successful economies is created by knowledge-
based industries that rely heavily on human capital with 21st century skills and technological innovation
(Department of Education, 2004; Department of Science and Technology (DST), 2007; NPC, 2012). The
White Paper on e-Education (2004) guides South Africa’s approach towards the integration of ICT in
pedagogy so as to increase access to learning opportunities by redressing inequalities, improving the
quality of teaching and learning as well as providing personalised and real world learning experiences.
Schools that implement “e-Education” must utilize ICT to enhance teaching and knowledge acquisition,
support the curriculum, access information that increases knowledge, inquiry and depth of investigation
as well as planning and management of various school activities (Department of Education, 2004).
Accordingly, the use of ICT in South Africa’s schools should encourage:

*Improved inventive thinking skills, such as creativity, problem solving, higher-order thinking skills and
reasoning, along with improved effective communication. Improvements in interpersonal skills, such as
writing, public speaking, teamwork and collaboration, and improved productivity skills, including
creating high-quality products, have also been reported. ICTs encourage a teaching and learning
milieu which recognises that people operate differently, have different learning styles and have
culturally diverse perspectives. ICTs embrace inclusive education by providing opportunities,
alternative methods of instruction and flexible assessments for learners who experience barriers to
learning. Benefits to the broader society include increased opportunities for lifelong learning,
communication and exchange essential to democratic living, and the creation of a pool of globally
competitive human resources. The development and implementation of e-Education will create the
pool from which our country can draw professional citizens and export African expertise around the world” (Department of Education, 2004: 16).

Therefore, the policy hopes that “Every South African learner in the general and further education and training bands will be ICT capable, that is, use ICTs confidently and creatively to help develop the skills and knowledge they need to achieve personal goals and to be full participants in the global community” (Department of Education, 2004: 17). To successfully integrate ICT in education, all teachers require the knowledge, skills, values and attitudes, as well as the necessary support to become mediators of learning, interpreters and designers of learning programmes, assessors and subject specialists, among others (Department of Education, 2004).

To prepare for the participation in the global knowledge economy, the Department of Science and Technology (DST, 2007) published South Africa’s ten-year innovation plan. The plan, in support of various sector departments, hopes to transform South Africa into a knowledge-based economy, in which its economic growth is led by the “production and dissemination of knowledge” to enrich all fields of human endeavour. That is, South Africa’s innovations in science and technology should be able to effectively manage “the negative effects of climate change in Africa; fighting crime; producing drugs to combat disease; developing sustainable energy solutions; introducing drought-tolerant, disease-resistant crops; devising “intelligent” materials and manufacturing processes; revolutionising our communications; and changing the work we do and the way we do it” (DST, 2007: 4) Accordingly, South Africa’s knowledge-based economy depends on four interconnected and interdependent pillars namely: innovation, economic and institutional infrastructure, information infrastructure as well as education. In this regard, the success of the plan would be measured by the degree to which science and technology contributes towards enhancing productivity, economic growth and socioeconomic development (DST, 2007). A society that effectively uses its “knowledge systems” and “human capital” to address development challenges and problems in their country while exploiting economic opportunities in a sustainable way is what South Africa needs to compete with developed nations in the knowledge-based economy.

According to the National Development Plan (NDP) 2030, “science and technology continue to revolutionise the way goods and services are produced and traded” which the former can also “be leveraged to solve some of the biggest challenges in education…” (NPC, 2012: 33). Hence, teaching and learning materials can be delivered electronically to all the areas in South Africa inclusive of remote villages. In 2012, the NPC confirmed that about 17% of South Africa’s population had access the Internet, a significant number that is expected to rise by at least 20% per annum. As a result, the use of digital technologies has transformed mostly the youth who embrace the “new media”, and this transformation represents a potentially effective intervention of “fostering social inclusion”. However, for South Africa to contribute massively to the global scientific and technological transformations, the country still needs to
develop its “innovative edge” which requires “greater investment in research and development, better use of existing resources, and more nimble institutions that facilitate innovation and enhanced cooperation between public science and technology institutions and the private sector” (NPC, 2012). Although the high costs of broadband Internet connectivity has been identified as a major challenge, all South Africans should be able to “acquire and use knowledge effectively”. Therefore, the NPC (2012) recommended that institutional arrangements to manage ICT environment must be better structured and developed in order to ensure that the country addresses the digital divide among its citizens.

South Africa’s national focus on ICT as a catalyst for participation in the global knowledge economy has provoked the initiation of ICT integration in education. The NDP 2030 vision on education states that “education, training and innovation system should cater for different needs and produce highly skilled individuals. The graduates of South Africa’s universities and colleges should have the skills and knowledge to meet the present and future needs of the economy and society” (NPC, 2012). To practically realise the vision, partnership across the South African education system and internationally accredited institutions should lead to higher levels of innovation, creativity and collaboration. Additional, South Africa’s investments will be channelled towards people development through education which will be used as an instrumental that will create societies that are better able to respond to the 21st century needs associated with “lifelong learning”, “continuous professional development” and “knowledge production” alongside innovation creativity and collaboration which are central to building the capabilities of individuals and the nation as a whole (NPC, 2012). Planning, governance, infrastructure, skills and culture however, must be considered for a country like South Africa with a medium HDI level. The NDP 2030 asserts that in planning and governance of the adoption and implementation of e-learning and/or blended learning, the interests of all stakeholders in education should be integrated and aligned to support the goal of achieving effective educational goals that addresses community needs and national development. Furthermore, educational institutions should be provided with the capacity to implement policy and where it is lacking, the challenge should be addressed urgently. South Africa hopes that by 2030 all schools would meet the minimum standards of ICT infrastructure development. According to the NDP 2030, “High speed broadband should be readily available and incorporated into the design of schools. This will enable greater use of technology in education and enhance the classroom experience for both teachers and students” (NPC, 2012: 303).

Moreover, distance education stands a good chance of also being expanded especially with institutions of higher learning such as universities and colleges. Distance education is defined by the Department of Higher Education and Training (DHET) of South Africa as “a set of teaching and learning strategies (or educational methods) that can be used to overcome spatial and/or temporal separation between educators and students” (DHET, 2011: 4). Accordingly, the distance education approach adopts a “multi-mode of delivery” which comes with opportunities to remedy the need for skilled human resources
through increased and speedy access to educational ICT, options for "retraining and personal 
enrichment", and the “balancing of inequalities between age groups” (DHET, 2011). The advancements in 
educational ICT and upfront investments especially in human resources are needed in technological and 
curriculum designs as well as quality assurance and monitoring of such a system. The Department of 
Higher Education and Training (DHET) in South Africa recently published two papers that guide the use 
implementation of blended learning especially in the provision of distance learning namely: the White 
Paper for Post School Education and Training (DHET, 2013) and the Policy for the Provision of Distance 
Education in South African Universities in the Context of an Integrated Post-school System (DHET, 
2014). The former estimated that by 2030, South African universities could expect a total enrolment of 
approximately 1.6 million students, which would be impossible for “traditional campus-based universities” 
to accommodate such huge numbers; therefore, blended learning should play an important role in future 
to assist in realising the educational dreams of the increasing numbers of students (DHET, 2013). 

Generally, South Africa has developed plans for the implementation of what it considers as effective and 
sustainable ICT infrastructure for development of skills necessary for the country’s participation in the 
global knowledge economy. The country has adopted the policy and analysis planning approach for its 
implementation of educational technology. Although South Africa is a developing country, it seems to be 
copying what developed countries are doing with regard to planning of blended learning. The subsequent 
section provides an overview of the appropriateness of the adopted planning approaches for blended 
pedagogies.

**Appropriateness of the Planning Approaches for Modern Transformation in the 21st Century**

The establishment of the e-learning environment depends primarily on adoption of suitable planning 
approaches and governance models as well as the necessary infrastructure, culture and skills. Thus, 
planning, governance, infrastructure, culture and skills collectively are necessary and sufficient conditions 
for successful educational transformation towards blended pedagogies. Ideally, planning for blended 
pedagogies must involve decision making, policy formulation for the realization of set goals, programmes 
of action and stakeholder participation with the aim of current and future sustainability (Dale, 2004; 
Theron, 2008; Tsheola, 2011). Thus, the norms and standards of blended pedagogies should be 
established on the grounds of the two broad categories of development planning, namely object-centred 
and process-centred planning with more emphasis on stakeholder participation. Apart from other 
stakeholders participation, planning for blended pedagogies requires participation of direct beneficiaries, 
inclusive of teachers and learners. Planning for blended pedagogies must take into consideration the 
context of teaching and learning, digital technology and associated infrastructures, teaching and learning 
designs and ICT skills, among other factors (Wolff et al., 2015; Glušac et al., 2015). Accordingly, blended 
pedagogies require a holistic planning approach, rather than e-planning alone, which supports 
partnerships, people-centeredness as well as attendant physical, economic and social aspects (Theron,
2008; Tsheola, 2011). Beyond planning approaches, models of governance are crucial preconditions for blended pedagogies.

In South Korea, a study aimed at discovering the insights into teachers’ decision-making related to consideration of technology use was conducted by Webster and Son (2015). The study eventually produced a set of thirteen concerns that directly affect teachers’ decisions concerning educational technology which include "risk taking, image, learning seeking, universal site use, sociability, efficiency, cultural alignment, real materials usage, student-centered ideas, influence of learning experiences, technology use in the class, technology training, and attitude towards technology" (Webster and Son, 2015: 91). Therefore, balance between teachers' internal factors as well as external concerns and demands form the basis on which teachers make decisions about the adoption of blended learning. This study confirms that although teachers received training, their levels of self-efficacy are still low whereas their educational culture does not support the adoption of blended learning. The low levels of self-efficacy and lack of appropriate educational culture in this regard are blamed on the lack of support from government during the implementation phase of adopting blended learning. Teachers more often than not, struggled to apply technological skills gained from their education, training and experience. Instead, teachers were "doing what works rather than what they knew works best" (Webster and Son, 2015).

Decades after the introduction of educational technology in Korea, teachers still follow the same practices that they were taught in leaving teaching and learning in the country to take place in an academic world that is separate from technological reality which current learner live in. Classroom observations confirmed that:

"Students ubiquitously used their Smart Phones to text (e.g., Kakao talk) with friends or to view various forms of media directly from the Internet while on their way to their classes. However, once they entered the classrooms, they were usually told to turn off their electronic devices, to open up their textbooks, and to listen for an hour and fifteen minutes to a teacher in front of a chalkboard. It was as if they had been transported back to the 1950s (or earlier) whenever they entered a classroom. The relief on many of their faces as they turned on their phones upon leaving and checked messages seemed like divers taking their first breaths again after plunging into the depths" (Webster and Sons, 2015: 92).

The inability of teachers to adopt blended learning is problematic as it does not conform to the "basic concept of continuity in learning for learners" (Dewey, 1938 cited in Webster and Son, 2015) and the notion that "school learning is at odds with authentic ways of learning to be in the world, and with social practice beyond the school gates" (Lankshear and Knobel, 2003 cited in Webster and Son, 2015).

Generally, ICT infrastructure in Thailand is growing at a stable pace although its quality is not sufficient enough to fulfil the needs of the population (Saekowand Samson, 2011; Khlaisangand Likhitdamrongkiat, 2015; Lee and Kim, 2015; Ninlawan, 2015; Pruet et al., 2016). With regard to access to computer, 26.8% of the total population have unrestricted access to the technology. In education, the ratios of the number of computers to the number of learners and number of computers per school are currently 1:40 and 6:1, respectively in schools under the Office of Basic Education Committee within the Ministry of Education.
(Lee and Kim, 2015). Moreover, more than half of the teachers in Thailand have already been trained on e-learning. Despite a number of achievements in e-learning, the Thai government is still investing massively in educational ICT. For example, more money has been invested for hardware, software and digital content development necessary for the integration of e-learning with conventional didactics. Mainly, the goals of these investments are to "raise the ratio of the number of computer to the number of learners to 1:20, acquire digital content for every subject area and every class level, offer professional development for teachers and educational personnel and provide secured and stable school network infrastructure" (Lee and Kim, 2009: 1322 cited in Lee and Kim, 2015). In terms of the future trend in e-learning, the Thais intend to use the technology of the future (advanced technology) to help conquer the digital divide.

Whereas a national ICT policy has been developed and adopted and adaptive model has been adopted for the governance of educational ICT, Zambia still experiences lack of institutional and sectoral policies on the integration of ICT into education and training (Ministry of Communications and Transport, 2006; Haßler, Hennessy and Lubasi, 2011; Haßler, Hennessy and Lord, et al., 2011; Annie et al., 2015). For example, while the Ministry of Communications and Transport has developed the national ICT policy, no e-learning policies have been developed by the education sector and thus, it is difficult to establish suitable guidelines and standards for the development educational technology, teachers' Pedagogic Technological Content Knowledge as well as leaners' computer literacy (Haßler, Hennessy and Lubasi, 2011; Haßler, Hennessy and Lord, et al., 2011). The lack of these policies means the non-existence of teachers’ and learners’ ICT competency framework which is at the centre of ensuring technological changes in education and training (Haßler, Hennessy and Lord, et al., 2011). Although the national ICT policy indicates the various ICT infrastructure available, more emphasis is placed on the use of personal computers, mobile technologies, radios, televisions, CD-ROMs and DVDs (Ministry of Communications and Transport, 2006). The policy in question strongly emphasize the contribution of ICT on the national development and participation in the knowledge economy and more importantly the need to include disadvantaged groups especially located in rural areas (Ministry of Communications and Transport, 2006; Haßler, Hennessy and Lubasi, 2011; Haßler, Hennessy and Lord, et al., 2011; Annie et al., 2015). However, the policy is written in English only and not in any of the local languages and that makes it difficult for those who cannot speak or write the language to make contributions towards the planning of e-learning in order to meet their needs and culture (Haßler, Hennessy and Lubasi, 2011). Overall, to realise the benefits of e-learning investments, appropriate planning approaches and governance models must be adopted as well as infrastructure, skills and culture that reflects both teachers’ and learners’ needs.

In practice, teachers’ integration of e-learning with conventional didactics in Kenya is not as yet realised in the classrooms (Onderi et al., 2013; Nyagowa et al., 2014). The inability of teachers adopt blended
learning is the results of their lack of Technological Pedagogical Content Knowledge and limited ICT resources (Onderi et al., 2013; Nyagowa et al., 2014) which are some of the necessary and sufficient condition for the success of this kind of transformation. Although teachers were trained to use ICT for teaching and learning purposes, they still fail to use the technology to integrate e-learning into the existing curriculum (Onderi et al., 2013; Nyagowa et al., 2014). Therefore, to successfully implement blended learning availability and accessibility of infrastructure as well as teachers’ Technological Pedagogical Content Knowledge must first be developed. To improve teachers’ and learners’ training, fast Internet connectivity should be restored and those who initially did not benefit from previous training sessions should be given opportunities during school holidays. These initiatives hope to improve the level of e-learning adoption in Kenya by improving teaching methods and techniques and allowing its users more time to practice (Onderi et al., 2013; Nyagowa et al., 2014).

A study which was conducted in Johannesburg of South Africa wherein a total number of 117 teachers from twelve schools were conveniently sampled, explored teachers’ attitudes towards educational technology (Hart and Laher, 2015). The findings of the study uncovered that the majority of teachers have access to ICT both at home and at school however, the technology is hardly used in classrooms (Hart and Laher, 2015). Therefore, access to the technology was not a sufficient condition for the implementation of blended learning in these schools. The study further assessed teachers’ perceived usefulness of blended learning by using perceptions about the value of e-learning over conventional didactics, the integration of technology with face-to-face methods, and, the management of complexity as well as tangible results that comes with the transformations (Hart and Laher, 2015). As per the findings of this study, most teachers’ perceptions on the usefulness of integrating e-learning with conventional didactics were high and this suggests that the prospects for adoption and implementation of technology at these schools is promising (Hart and Laher, 2015). However, focus needs to be on the “culture and social norms” of both teachers and learners in order to achieve effective and sustainable change brought by the implementation of blended learning in these South African schools. The low levels of e-culture and social norms with regard to ICT could be a major hindrance to the integration of e-learning and conventional didactics. Generally, South Africa is “putting the cart before the horse” in its implementation of the digital learning. The provision of Tablet to all the learners is desirable however, this should have been the final step in the adoption of e-learning. Although all the preconditions of blended learning are equally necessary, their order of priority determines the success of digital technologies in education. The country should have first focussed on providing teacher with training on how to integrate education ICT in their work and also encouraging the appropriate e-culture among users instead of prioritising infrastructure before any other thing. Across all countries, the slow pace of the adoption of blended learning reflects at the most, the inappropriateness of the planning approaches adopted by various countries across the four levels of development, limited infrastructure provided as well as lack of necessary skills and e-culture among teachers and learners.
Conclusion

This paper uncovered the various planning approaches adopted by countries with different HDI. Countries with very high and high HDI as well as those with medium and low HDI categorised as developed and developing have adopted the same planning approaches, respectively. Seemingly, the level of development which is measured by the determination of a number of elements inclusive of ICT infrastructure, among others influences the adoption of the appropriate planning approaches. South Africa's development leadership among developing countries seems to be misleading its adoption of planning approaches for blended pedagogies. Similarly, the country seems to be in competition with developed countries hence its adoption of the planning approaches. However, the question remains: To ensure effectiveness and maintain sustainability, is South Africa's planning of blended pedagogies in line with its infrastructure as well as teachers and learners' ICT skills and culture?

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Disability Benefits Payable by Retirement Funds under the South African Law

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Abstract: The purpose of the Pension Act 24 of 1956 (the Act) is to provide for the registration, incorporation, regulation and dissolution of pension funds and for matters incidental thereto. Amongst these incidental matters are the retirement fund and death benefits. However, the Act does not make mention of the disability benefits in its context. Against this background, this paper examines the importance of the disability benefits by retirement funds in the South African context. The paper further provides for a broader conceptualized definition of disability and argues for the provision of a medical evidence to substantiate disability. Towards this end, this paper examines the determinations which specifically dealt with disability.

Keywords: disability benefits, retirement, injuries, pension fund

Introduction
The purpose of the retirement fund is to provide its members with retirement benefits so that members can retire at an appropriate age (Jeram 2009). Funds also provide death benefits to ensure that the member’s dependants are taken care of if the member dies before retirement (Jeram 2009). Although the Pension Funds Act 24 of 1956 makes no mention of disability benefits, many funds provide these benefits so that should the member become unable to work, he or she will have an income that will sustain him or her. It is important to know how these benefits are provided, who decides that the member is disabled and what is the employer’s role in deciding if the member should get disability benefits (Jeram 2009).

Disability benefits are payable upon the happening of an event specified in the fund’s rules or policy documents. For the purpose of this article, disability benefits specified in the policy documents will not be discussed. In most instances, the rules confer discretion on the trustees to determine whether or not a member is disabled as defined and qualifies for the disability benefit (Shrosbree 2005).

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Although the purpose of a discretionary power is to allow the functionary conferred therewith to take the decision, it is nevertheless curtailed by the administrative law requirement that a discretionary power must be exercised properly. A proper exercise of discretion in turn requires that the decision maker considers all relevant factors, discard irrelevant factors and not fetter its discretion. Furthermore, the decision must not reveal an improper purpose. This is where the review function of the Pension Funds Adjudicator comes in. If the complainant shows that the board failed to consider all relevant factors or took into account irrelevant considerations or fettered its discretion, its decision is reviewable on the grounds that there was an improper exercise of discretion (Shrosbree 2005).

In all disability claims, the starting point is the definition of disability contained in the rules, the question being whether the member falls within that definition to qualify for the benefit. The majority of disputes arise because the trustees are of the opinion that the member does not fall within the ambit of the definition whereas the member contends that he or she does.

Methodology
The research methodology used in this study is qualitative as opposed to quantitative. This research is library based and reliance on desktop, Pension Fund Adjudicator’s determinations, legislation, and articles. This study is largely a case analysis of the Pension Fund Adjudicator’s determination on the disability benefits payable by retirement funds in the South African context. However, a very limited comparative study was employed.

Objective
The primary objective of this paper is to investigate the impact associate with the exclusion of a member from the disability benefit. This paper further seeks to serve as the yardstick on who should qualify the disability benefit payable by the retirement fund.

Significance of the Study
Many employees in the labour force who are injured in their course of duties often find themselves the administrative predicaments associated with the awarding of the disability benefits. It is therefore significant that the fund know the importance of fairly awarding the disability benefit to the qualifying employees as well as the consequences for failure to do so.

Literature Review
First and foremost, this paper acknowledges the fact that in South Africa there is a very limited literature and only a handful scholarly articles and books are written in this subject matter. Much of it is based on the determinations laid by the Pension Funds Adjudicator who regulates supplementary pension schemes...
and complaints relating to pension issues. These determinations will form major part of this article and they are well discussed below. It must also be borne in mind that the Pension Funds Adjudicator's decision can be reviewed in the High Court.

Be that as it may, according to Du Preez (2012), employees should not allow their employers to decide for them on whether or not they qualify for a disability benefit. Her argument was founded on the basis that it is the employees' retirement fund or their life assurer and as such they should make the decisions themselves. However, Stevens (2001) differed with Du Preez in her view and argued that employees usually do not know what benefits are available, how the policies or benefits work, and it is usually the left-behind wives who have no idea of the benefits payable to them on their husbands' deaths.

Hence, the rules of the fund provide that, a member who is in receipt of a disability benefit from an insurer will remain a member of the fund notwithstanding the fact that he is no longer employed by a participating employer (Hunter 2001). The rules also say that such a member’s membership will terminate if he stops receiving the disability benefit (Hunter 2001).

Against this backdrop, employees need to be properly advised on the issues related to disability benefits there should not be distinct disincentive to work because of a possible loss of disability benefits (Klaus 2012).

**The Definition of Disability**

Many disability definitions require the member to be unable to pursue his or her own occupation or a similar function. To qualify for disability benefits, the member has to suffer from a physical or mental infirmity that prevents him or her from performing his or her own or similar occupation or he or she will have to be disabled as defined in terms of the definition of disability in the fund rules.

The Dictionary of Occupational Titles (DOT) published by the US Department of Labour, Employment and Training Administration and the US Employment Service is a useful guideline in this regard. It lists the requirements of various occupations and then with reference thereto lists the occupations which may be considered "similar" to it. For example, according to DOT, a diesel mechanic requires a high degree of strength, a reasoning development level which involves the application of rational systems to solve practical problems and interpret instructions in the written, oral, diagrammatic or schedule form, a mathematical development level which includes computing discounts, profits and loss, mark-up and selling price, ratios, percentages, calculating surfaces, volumes, weights and measures, and a language development level which includes the ability to read books, magazines, encyclopaedias, read safety rules, instructions in the use and maintenance of shop tools and equipment and writing reports with proper format. DOT then lists the following alternative occupations as requiring the same level of strength,
reasoning, mathematical development and language development as the occupation of a diesel mechanic: a salesperson of automobile accessories (retail and wholesale), a warehouse manager, a storekeeper and a store man.

A useful test (applied in Honey v Central South African Railways 1910 TS 592) in these cases is to determine the main requirement or skill of the occupation in question and then to determine similar occupations with reference to that main requirement or skill. In Malan v First National Bank Group and Another, case no. PFA/NW/3284/01/CN, the Adjudicator had to determine whether the occupations of a home loans clerk and management clerk could be said to be “similar” to a Departmental Head Liaison. In applying the test, he considered that the main skills required of a Departmental Head Liaison are supervisory, organisational, control, and managerial skills. The complainant was in charge of the employer’s day-to-day operations relating to customer accounts. She also had to liaise with customers and the public, train and develop subordinate staff, act as a supervisor to the tellers and perform general supervisory control tasks. The occupations of a home loans clerk and a management clerk do not require these supervisory, managerial, and organisational or control skills. They are also predominantly sedentary or administrative in nature. On this reasoning the Adjudicator held in an interim ruling that the occupations of a home loans clerk and management clerk could not be regarded as “similar” to that of a Departmental Head Liaison (Weidemann v Unifoods (Pty) Ltd and Another [2004] 10 BPLR 6171 (PFA)).

Many disability definitions require that the member be totally incapable of performing his or her occupation or totally incapable of performing any occupation. This raises the question whether a member who is still able to perform some of the duties of his (or any) occupation can nevertheless be considered totally disabled. A reasonable interpretation of such disability definitions is that the member must, in a practical sense, be unable to carry out his or her work. In other words the word “totally” must be interpreted generously such that even if a member is able to perform some of the duties of his occupation, if he is generally unable to meet the demands of the job on account of his ailment, he may be classified as totally disabled.

In Reynolds v Metal and Engineering Industries Provident Fund and Another (2) [2001] 1 BPLR 1513 (PFA), the complainant, a sander by trade, required the assistance of his colleagues to perform the majority of his duties at work on account of his injury. He was also only able to perform the lighter tasks. He struggled to handle the machinery due to his restricted mobility and, because he worked much more slowly than before, he often had to work overtime. Furthermore, he did not cope with the long hours of standing which the work of a sander entails.

The Adjudicator concluded that although the complainant could perform some of the tasks of a sander, he was, in a practical sense, unable to carry out the demands of his job, and thus fell within the ambit of the
definition requiring totality of disability. Some disability definitions require the member to be incapable of performing not only his own occupation, but also any other occupation for which he could reasonably become qualified. A typical clause reads: A member shall be regarded as totally and permanently disabled if in the reasonable opinion of the board he has been so disabled by injury or illness as to be continuously, permanently and totally incapable of engaging in remuneration or profit

- in his own occupation, or
- in any other occupation to which he is suited or which he is or could reasonably be expected to become qualified by his knowledge, training, education, ability and experience.

In this regard, there are two definitions which should not be confused, namely the definition which includes the phrase “may become suited by his training” and the definition which includes the phrase “could reasonably be expected to become suited or qualified by his training and experience”.

The latter definition requires the possibility of further training to be taken into account. However, in respect of the former definition what is contemplated is that the claimant’s present training and experience be taken into account to determine if the member is capable of performing an alternative occupation (Munnik v Cape Joint Retirement Fund (1) [2000] 11 BPLR 1257 (PFA) and (2) [2000] 11 BPLR 1270 (PFA)).

The majority of disability definitions require that the disability in question be of a permanent nature. A member will discharge this onus if he can prove that his disability will probably continue for an indefinite period of time. However, he need not go so far as to prove that he has no hope of recovery. Occasionally, the medical evidence reveals that if the complainant underwent surgery or other medical treatment/procedure he might be cured or substantially cured of the condition.

A difficult issue in law is whether the fund may raise this as a defence to a claim of permanent disability. The answer lies in what the rules say. If the rules state that the member shall not be considered disabled if the inability could be substantially removed by medical treatment (or wording to that effect), then the fund is entitled to rely on the possibility of surgery or other medical treatment to repudiate a member’s claim (Hiebner v Metal and Engineering Permanent Disability Scheme [2004] 2 BPLR 5451 (PFA)). However, if the rules do not make any such reference, then if the member’s condition constitutes a disability, which without medical intervention would be permanent, he would have satisfied the requirement of permanent disability (Lee v Motor Industry Fund Administrator (Pty) and Another [2002] 6 BPLR 3587 (PFA)).
**The Role of Medical Reports**

The written submissions in the majority of complaints before the Adjudicator focus almost exclusively on the medical evidence. The board supports its decision with reference to the medical reports of their own doctors, usually selected from a medical panel and the complainant supports his complaint against the boards’ decision with reference to the medical reports obtained from his own doctor/s. In this regard it is important to distinguish the concepts of “impairment” and “disability”.

“Impairment” is a medical concept to be assessed by medical means, whereas “disability” is a legal concept determining the effect of the impairment on a person’s life in the context of his job description, the definition of disability and personal factors such as education and experience. As such, boards are not entitled to rely solely on the medical reports obtained, but must also apply their own minds to the question of whether or not a member falls within the disability definition (Jacobz v Altron Group Pension Fund and Others [2003] 8 BPLR 5071 (PFA)).

**Disability Benefits Determinations**

*Determination on the delay in the awarding of disability benefit*

In Gxotiwe v Private Security Sector Provident Fund and Another [2007] 3 BPLR 303 (PFA), the complainant, Mr Gxotiwe was employed by Sechaba Protection Services Western Cape (“the employer”) in February 2003 and became a member of the Private Security Sector Provident Fund (“the respondent’) in November of the same year.

In June 2003, Gxotiwe was pushed out of a moving train and suffered an injury to his left leg that led to it being amputated above the knee. In October 2004 the respondent received a termination form from the employer, dated 7 July 2003. Subsequently, while still processing the termination, the respondent received a letter notifying them that Gxotiwe had not resumed his duties since suffering the disabling injury. The respondent then notified African Life Assurance, which handles the fund’s risk benefits. African Life responded by informing the fund that the claim had been repudiated on the grounds that the disability claim was lodged more than six months after the disability occurred. The delay had resulted in the claim going out of prescription as per the terms and conditions of the assurance agreement. The sad outcome was relayed to Gxotiwe. In March 2006, the fund’s board referred the case to occupational therapists employed by negotiated benefits company Health Risk Management, to assess the validity of the disability or impairment.

The occupational therapists returned a report that validated the disability and further confirmed that Gxotiwe was disabled to the extent that he could not be reasonably expected to engage in any occupation that required his training or experience. Based on the medical reports and the above
information, the board then reviewed the claim and decided to award Gxotiwe an ex gratia and final payment of R11 681, which has been accepted by Gxotiwe without acknowledgment of liability. The respondent informed the Pension Funds Adjudicator that had the employer submitted the claim in time, Gxotiwe would have received double his annual salary of R14 601 and that the total amount would have been R29 969, plus his fund value of R766.

In response, the employer claims to have signed and given the disability claim forms to Gxotiwe on his insistence that he personally wanted to lodge the forms with the respondent, a claim that is denied by the complainant. The Adjudicator ruled that the idea of Gxotiwe holding onto those forms for 17 months is far-fetched, as the forms would have provided financial relief for him. What nails Sechaba Protection Services, is the fact that the administrator’s rules place the responsibility for submission of documents on the employer.

Secondly, if indeed it were true that disability forms were signed, the employer should at least have had copies of them in their records. The Adjudicator referred to fund rules that showed that the respondent had acted properly and proved that the employer had acted irresponsibly by not submitting the disability claim on time. That act of omission resulted in Gxotiwe being disadvantaged and losing out to the tune of R18 287. The Adjudicator had finally ordered the employer to pay Gxotiwe the R18 287 with 15% interest within six weeks. This is despite the fact that he has already accepted the ex gratia payment from the respondent. The ruling will force employers to take employee interests more seriously.

The Gxotiwe case is not an isolated case. There are many families that have suffered to the extent that homes have broken down due to financial pressure caused by delayed payment of benefits. In Barry v Standard Bank Group Retirement Fund [2005] BPLR 242 (PFA), the dispute between the parties related to the amount of disability benefit payable by the fund to the complainant. In this case, the Adjudicator ruled that in terms of the fund’s rules, the amount of the disability benefit is determined by the member’s degree of disability. The parties were at odds over whether or not the complainant was more than 50% disabled, with the fund contending that she was less than 50% disabled. The definition of disability required a member to be permanently unable to perform his own occupation or any other occupation. It was found that on a reasonable interpretation this meant that it was not necessary for a member to be unable to perform any of the duties of his occupation. What was required was that a member had to be unable to carry out his work or had to be unable to perform his work effectively.

In determining the complainant’s degree of disability in this case, the fund relied largely on its policy guidelines. The Adjudicator found the application of the guidelines to have been incorrect. The fund’s requirement that the complainant exhausts all alternative treatments before seeking a benefit, was not supported by the rules or policy guidelines. Finding that the trustees’ decision was unreasonable, the
Adjudicator remitted the matter to them for reconsideration, taking into account the observations and findings made in the determination. In assessing disability claims, pension fund trustees are required to consider all the evidence before them.

**Determination based on Incapacity**

The Adjudicator’s decision in *D v Sentinel Mining Industry Retirement Fund* Case number PFA/WE/3851/05/LS, unreported was based on the apparent failure of the trustees to properly consider certain evidence that had been submitted. The complainant was employed by the Goldfields Mines (“the employer”) as a ventilation observer and was simultaneously a member of the Sentinel Mining Industry Retirement Fund (“the fund”). In 2003, he was dismissed on the grounds of incapacity. He requested the fund to pay him a withdrawal benefit accordingly. However, from the withdrawal form completed by him, it was apparent that he had been dismissed on medical grounds. For this reason, the fund advised the complainant to apply for an ill-health early retirement benefit, which he duly did.

The rules of the fund provide that a member qualifies for disability cover when he becomes, in the sole opinion of the trustees, totally and permanently incapable of carrying out his own and any similar occupation. According to the fund the complainant failed to show that he was disabled as defined and repudiated his claim accordingly. This was the basis of the complaint to the adjudicator. After canvassing all the evidence that had been before the trustees when they made their decision, the Adjudicator found that the conclusion they reached was not reasonable and the fund was ordered to pay the complainant the disability benefit provided for in the rules.

In reviewing the trustees’ decision, the Adjudicator relied on the test espoused in *Southern Life Association Limited v Miller* [2005] 4 BPLR 281 (SCA), a decision of Farlam J in the Supreme Court of Appeal. In that case, counsel for the Appellant had referred the court to the case of *Edwards v Hunter Valley Coop Dairy Co Ltd* (1992) 7 ANZ Ins Cas 61-113, a decision of McClelland J sitting in the Supreme Court of New South Wales, Equity Division. McClelland J referred to a series of decisions given in England in the 19th century including the decision in *Doyle v City of Glasgow Life Assurance Co* (1884) 53 ILJ Ch 527 in which North J said (at 529):

> The only question in the action is whether the dissatisfaction of the directors with the evidence of death adduced is unreasonable. Now, in respect of that it must be observed that reasonable persons may reasonably take different views. It constantly happens that a Judge sitting in the Court below takes one view of evidence and the Judge sitting in the Court above takes another. But no one could suggest for a moment that the view taken by either the one or the other was unreasonable (Cited in Southern Life Association Limited v Miller [2005] 4 BPLR 281 (SCA) at page 290).

McClelland J then stated:

> Unless the view taken by the insurer can be shown to have been unreasonable on the material then before the insurer, the decision of the insurer cannot be successfully attacked on this ground.
Farlam J held at page 290 E–F that the legal position set out above is in accordance with our law. Therefore, the scope of review of an exercise of discretionary power is narrow. The test is not whether or not the trustees were wrong in repudiating the claim for disability, but rather whether the decision they reached was reasonable on the evidence before them (at paragraph [27]). This means that the reviewing body does not necessarily have to agree with the decision that was taken. It is also restricted to the evidence that was before the decision-maker at the time the decision was made.

In Konstabel v Metal and Engineering Industries Permanent Disability Scheme and Another [2002] 7 BPLR 3637 (PFA), the Complainant worked as a laminator until 21 September 1999 when she was dismissed on the basis of incapacity. The first respondent is the Metal and Engineering Industries Permanent Disability scheme and the second respondent is the Metal Industries Provident Fund. The Complainant had injured her back in 27 March 1998 during the course and scope of her duties. Due to persistent pains and lower back pains and pains in her left leg and without any alternative work available which the complainant could perform a decision was taken to terminate the latter’s employment on the basis that the complainant was totally incapacitated. The fund subsequently applied for a disability benefit for the complainant.

The Complainant consulted various doctors and specialists before and after her dismissal who suggested that she was not permanently disabled or incapacitated to the extent that she was unable to engage in further employment in whatsoever capacity (Konstabel v Metal and Engineering Industries Permanent Disability Scheme and Another [2002] 7 BPLR 3637 (PFA)). It is on this basis that the claim was repudiated.

The question before the adjudicator was whether, in accordance with the rules of the scheme, the Complainant was permanently disabled or incapacitated, and was not able to engage in further employment in whatsoever capacity in the industries, and whether the scheme, having regard to the medical evidence before it, applied its mind properly in repudiating the complainant’s claim. The answer to the questions is found in the rules of the scheme which provide that if a claimant is able to perform any employment in the industries, they would not qualify for a benefit.

The Adjudicator had concluded that the complainant would be able to return to work if her tasks are modified to suit her condition and therefore does not qualify her from receiving a disability benefit as required in terms of the rules of the scheme.

So what lessons can we learn from Konstabel? The fact that a member experiences persistent pains and suffering does not render such a member. Permanently disabled or incapacitated to the extent that he or she is unable to perform his normal duties. Consequently does not qualify for a disability benefit.
Permanent disability and incapacity would mean in this instance that the injured member must not be able to perform any task, even if such task is modified to suit her condition (Sithebe v Iscor Employees Provident Fund and Another [2002] 10 BPLR 3990).

Similarly in Lee v Motor Industry Fund Administrator (Pty) (Ltd) and Another [2002] 6 BPLR 3587 the complainant was injured whilst on duty. He stopped working and returned to work some months later however unable to carry out his duties at work and on the recommendation of his doctors he stopped working on the 26 June 1998. The complainant applied to the fund for disability. At first, the First respondent, Motor Industry Fund Administrator (Pty) (Ltd), declined the Complainant’s claim but later admitted the claim and paid the Complainant a benefit.

The Complainants however contended that the fund ought to have paid him his benefit from the date on which he incurred his injury at work. Although he returned to work in May 1998, the complainant stated that he was unable to work effectively on account of his injury (at paragraph 7G-H). The question before the adjudicator is what date did the complainant become disabled as required by the rules to qualify for a benefit? Or put it differently on what date did the complainant become continuously and permanently unable to perform his work as a motor technician? The Complainant is entitled to payment of a disability benefit as from that date (at Paragraph 10).

The fund explained that the permanency of the Complainant’s condition had not been adequately proved at the time of his initial application, as not all available treatment options had been exhausted. The stance was that since the Complainant had failed to undergo surgery as recommended by his doctors, he could not be considered permanently disabled. This involved the question of whether a disability can be classified as permanent if it can be removed by surgery or other medical treatment (see Hiebner v Metal and Engineering Industries Permanent Disability Scheme PFA/WE/2947/01).

In terms of our law, once it is established that a disability is otherwise permanent, the insurer shall be liable despite the fact that surgical procedures might cure the disability, unless it is provided otherwise (Lee v Motor Industry Fund Administrator (Pty) (Ltd) and Another [2002] 6 BPLR 3587 at 3588). The adjudicator pointed it out that in this matter there is no provision in the rules stating that the assured shall not be considered totally and permanently disabled if his inability can be substantially removed by surgery or other medical treatment (at paragraph 19). It was further stated that the Complainant’s condition without medical intervention was permanent and prevented him from performing his normal work, he satisfied the requirements of the definition and the Second Respondent would have erred in declining his initial claim September 1998. By assuming that the Complainant could not be considered permanently disabled prior to undergoing surgery, the First Respondent took an irrelevant consideration into account and thereby erred in its determination of the date of the disability (Lee v Motor Industry Fund Administrator (Pty) (Ltd) and Another [2002] 6 BPLR 3587 at 3588).
Administrator (Pty) (Ltd) and Another [2002] 6 BPLR 3587 at page 3588). Based on the medical evidence, the complainant was found to be continuously and permanently unable to perform his normal work as from the 26 June 1998. He was therefore entitled to the disability benefit from that date.

The Fund’s unfair refusal to grant member disability benefits

In Venter v Municipal Gratuity Fund and Another 2002 10 BPLR 4008 (PFA), the complainant had been employed as a traffic superintendent at Bethal Transitional Local Council and had been a member of the First respondent, the defined contribution Municipal Gratuity Fund since 1 July 1996. The Complainant allegedly sustained an injury on duty on 30 January 1998 where he hurt his left shoulder and left leg after stepping into a hole in the ground; he received a payout in respect of this injury from the Competition Commissioner. However he suffered from considerable pain in his shoulder and knees thereafter. Surgery to his shoulder in November 1998 did not alleviate the pain. He stated in his application that the pain, difficulty of movement and resultant lack of concentration interfered with his ability to perform his job (at paragraph 4H-I). The Application for disability benefits was refused by the fund on 1 March 2000. The Complainant requested the Fund to review its decision and furnished further medical reports however the decision of the fund was not changed (at paragraph 6). The Complainant contended that the fund unfairly refused his claim and that it had unreasonably amended the disability rule and that the medical investigation of the Second Respondent, Momentum Risk Management Consultancy, was not objective and not based solely on medical criteria in accordance with the fund’s rules (at paragraph 6A-B). The rule which regulated disability benefit had been amended several times since the Complainant became a member of the fund. The amount of the benefit had been increased and the definition of the disability had been adjusted in a way that makes it more difficult to qualify.

In essence the rule required that the member be not only permanently but also totally incapable of discharging the duties, not only for which he was appointed, but also "with or without further training" any other duties which such member would reasonably be capable of discharging by virtue of his training and/or experience"(at paragraph 8G-J). The adjudicator stated that “section 37A refers to rights which have already vested, and not to the power of the fund’s management committee to make rule amendments. The management committee is entitled to make rule amendments as it sees fit, provided it does so in accordance with the rules and the Act regarding the making of rule amendments, which it had done in this case”(at paragraph 14)

The Adjudicator observed that the Complainant was only entitled to the benefits determined by the rules of the fund at the date of termination of his service and was accordingly had no benefit or right provided under the rules in operation at that time (at page 4009).
The Old vs The New Insurers? Determination of Munnik v Cape Joint Retirement Fund revisited

In Munnik v Cape Joint Retirement Fund [2000] 11 BPLR 1257 at 1259, the complainant commenced employment with the Winelands District Council as a Professional firefighter in or about 1977 and became a member of the Cape Joint Retirement Fund in 1 July 1990. The Complainant suffered a heart attack on the 21 December 1997 whereupon the latter applied to the Cape Retirement Fund (the Fund) for a disability pension benefit in terms of the rules of the fund on the ground that he had been rendered totally and permanently disabled to continue working as a firefighter (at page 1258-1259). The fund had decided to change the insurers of the disability benefits and the date of the Complainant’s disability fell within a window period when benefits were neither insured by the old nor the new insurers. However, the new insurers had agreed to provide assessments of claims that fell within the window period and thus the claim was referred to the new insurers (at page 1261). In terms of the rules of the fund, the trustees would be obliged, after receiving the assessment, to decide whether or not a claim would be paid from the fund’s reserve account (at page 1257).

The new insurer called upon the Respondent, on several occasions, to provide them with the definition of “disabled” to be applied in assessing the claim. As no response was received, the insurer applied the definition contained in the insurance contract, which provided that a person was disabled if he was rendered incapable “of engaging in his/her own occupation or in another occupation for which he could reasonably be expected to become qualified by virtue of his/her knowledge, training, education, ability and experience” (at page 1257). It was on this basis that the complainant’s claim for disability benefits was denied.

The Adjudicator observed that there was a duty on the trustees to ensure that the insurer had applicable definition at hand when assessing the Complainant’s claim especially when they knew that they would be relying exclusively on the insurer’s assessment reports. Accordingly, the trustees appear not to have applied their minds as to whether the Complainant falls within the scope and ambit of entitlement to a disability pension in terms of the rules (at paragraph 26F-G). The Adjudicator referred the to the case of Honey v Central South African Railways were the court looked at the main requirement/skill of the work of previously performed and concluded that similar occupations were those which similarly utilized that main requirement or skill (at paragraph 37F-G).

The insurer in the present case, the insurer came to the conclusion that although the Complainant is incapable of pursuing his own occupation as a fireman on account of his disability, he is capable of engaging in another occupation (at paragraph 38H). The adjudicator found that the main requirements and skills of a firefighter were muscular strength, anaerobic and aerobic fitness and a resilient respiratory system and concluded that the suggested alternative occupations did not require these attributes. In the premise, the Adjudicator was satisfied that the Complainant was disabled to the extent that he can no
longer pursue his own or similar occupation for which he would be qualified by his training and experience as a fireman and that he accordingly falls within the ambit of the definition of disability entitling him to benefits provided in the rules.

From the above cases, the following becomes clear regarding disability claims. Firstly, it is important to determine whether the Complainant is unable to pursue his own occupation or similar occupation for which he could be reasonably expected to become qualified by his knowledge, training, education, ability and experience. Secondly if the Complainant can show that he is unable to perform his own occupation, then it is reasonable to assume that he is unable to perform a similar occupation as well (Sefako v Fisrt National Bank Group Pension Fund (1) [2002] 2BPLR 3097(PFA) at para 23D-F). Thirdly, the focus should therefore be on whether or not the Complainant is able to pursue his own occupation. Fourthly, the onus rests on the Respondent to show that the Complainant is able to perform a similar occupation (Sefako v Fisrt National Bank Group Pension Fund (1) [2002] 2BPLR 3097(PFA) at para 23D-F). Lastly, the Adjudicators are in most instances in favour of granting disability benefits to complainants from date of injury or the date which the Complainant stopped receiving salary (Kruger v IMATU Retirement Fund [2003] 9 BPLR 5095 (PFA).

Conclusion and Recommendation

This paper successfully examined the impacts of failure or omission to adhere to the payment for the disability benefits of the members which are payable to the retirement fund. The furthermore, the paper also provided the clear and broader definitional meaning of disability benefits within the South African pension law jurisprudence. This paper argues that the employee should ensure that it is at the center of claimant for disability benefits once he/she is no longer capable to carry out his/her duties as a result of disability.

Discussion and analysis of the Pension Fund Adjudicator’s determinations on the disability benefits unraveled several adversarial conducts by the Fund when awarding the disability benefits to the deserving employees. Chief among these determinations is the delay in the awarding of the disability and the unfair refusal to grant the member with the disability benefits.

Towards this end, this paper suggests that the fund needs to facilitate the awarding of disability benefits to the employees in a fair and equitable manner free of inauspicious procedural hiccups. Indeed, similar facilitation is feasible and warranted in the current pension law jurisprudence.

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Livelihood Resilience and Diversity in the face of Socio-Economic Challenges: Exploring the Experiences of Urban Youth in Harare (Zimbabwe)

Clement Chipenda

Abstract: The article is aimed at unearthing the livelihood and survival strategies which the urban youth in Harare (Zimbabwe) have adopted as a response to socio-economic challenges which have been witnessed in the country over the past decade and a half. Deteriorating socio-economic conditions characterised by high poverty and unemployment levels in the face of reduced and poor economic performance by the country have left young people vulnerable to poverty and unemployment. These challenges have led them to adopt various formal and informal livelihood activities which are aimed at improving their lives. Employing sociological theories of structuration, agency and social organisation; this article argues that the young people in the urban area of Harare have adopted survival strategies which have seen them being able to meet their individual, family and community needs in an environment which has been very difficult and challenging. Using qualitative research methodologies and various data gathering instruments, the article shows from a sociological perspective how the urban youth have organised themselves as individuals and groups to make a better life for themselves in the face of what would otherwise be perceived as insurmountable challenges.

Key Words: agency, informal sector, economy, social organization, youths, Zimbabwe

Introduction

Over the past fifteen years, Zimbabwe has faced severe economic challenges which has been a consequence of the culmination of various factors but whose overall impact has been negative on the population. Several factors have contributed to these economic challenges and these have included poor management of the national economy by the ruling Zimbabwe National African Union Party – Patriotic Front (ZANU-PF), the adoption of disastrous neo-liberal economic policies in post-independent Zimbabwe and a poorly planned and executed land reform programme. Additionally, an ill-conceived and incoherent
foreign and domestic policy over the past decades, participation in an expensive war in the Democratic Republic of Congo, corruption, massive brain drain, unprecedented inflation which broke world records are often cited as the major contributors to the economic and social demise of the country (see Addison and Laakso 2003, Bond 1998, Raftapolous 2009, Meldrum 2001). What is important at this juncture is to take note of the negative consequences which poor economic performance has had on the livelihoods of the people in the country in the long term. The social and economic consequences of the challenges which the country have faced have resulted in lack of investment in social services and hyper-inflation which in 2008 reached unprecedented levels resulting in the abandonment of the Zimbabwe dollar in favour of the multiple currency system. Company closures have also been very common in the country resulting in high levels of unemployment, brain drain and a sharp drop in the country’s Gross Domestic Product (GDP) have negatively impacted on the lives of the people (see Makochekanawa 2009, Raftopoulos 2009, Pilossof 2009, Crush and Tevera 2010). Of interest to this study is the impact which these economic challenges have had on the young people called the youth who are aged between the ages of 15 and 34. In the context of these young people, this paper explores the specific socio-economic challenges which they are facing in the face of wider socio-economic challenges facing the country and how from a sociological perspective they are managing to overcome these challenges.

In the study, young people are presented as a group of people who are just starting their lives having for years been provided for, cared and protected by their families and communities. This group is seen being in a process of transition from childhood to adulthood. In the process of transition, they are exposed to a real and oftentimes brutal situation culminating from a challenging socio-economic environment currently enveloping the country. They are seen as having to adjust and embrace the current prevailing situation as they meet their present needs while preparing for their future roles founded on their dreams and aspirations and this needs contextualisation based on the socio-economic realities of the country. Against this background the study was aimed at exploring the socio-economic realities and the current situation of the urban youth in Harare. Having understood this background, the study was interested in getting the views of young people on their perceptions of the current situation, their future aspirations and how they believed they would attain any goals and milestones which they had set for themselves. In the face of high unemployment levels, company closures and poverty; the study had an interest in unearthing the different income generating activities which young people are currently engaging in and the available opportunities as well as challenges which they face. In doing this exploration, the study employed the theoretical frameworks of structuration and agency as postulated by Giddens (1984) and that of social organisation. It was considered to be important not only to understand the current realities of the youth in Harare but also to understand how they as individuals and societal members are dealing with the adverse socio-economic conditions and using individual abilities and societal resources to be resilient and to put in place measures and initiatives which have improved their lives.
This article in its attempt to present on the socio-economic realities of the youth in Harare will briefly present on the theoretical framework employed in the study, the socio-economic realities of the youth, issues on informal activities, the research focus and methodology employed. It will also present a brief discussion of results from the study and a conclusion.

**Theoretical Framework**

The study employed the theories of structuration, agency and social organisation in its attempt to understand the youth in Zimbabwe urban areas and how they are surviving under challenging conditions. The theory of structuration and agency is found in the ideas of Anthony Giddens and how he viewed the relationship between individuals and social forces. Giddens (1984) conceptualised structures as rules and resources that actors use in interaction. They are recursively implicated in the reproduction of social systems resulting in a recurrent patterned arrangement which influences the individual. For Giddens rules are defined as ‘generalisable procedures and methodologies that reflexive agents possess in their implicit stocks of knowledge that they employ as formulas for action in social systems’ (Giddens cited in Turner 2001: 972) These rules of structure are seen to be informal, widely sanctioned and used in daily routines, conversations and rituals (Giddens 1984). These rules are seen as restricting social action but resources facilitate it (Lamsal 2012). Structures also involve the use of ‘material equipment’ and ‘organizational capacities’ which social actors are seen using to facilitate social change. Giddens (1984) indicates that traditions, institutions, religions, social class and moral codes exemplify structures.

In explaining structuration Giddens is seen trying to emphasise the duality which exists between structure and agency. Agency refers to the ability of an individual to work independently and to make their own free choices. Actors for Giddens (1984) are agents who have the capacity to rationally ‘transcend the whims’ which are seen as being imposed by social structures so that they are able to exercise their own free choice. Emirbayer and Mische (1998:970) define agency as ‘… the temporally constructed engagement by actors of different structural environments – the temporal-relational contexts of action – which, through the interplay of habit, imagination, and judgment both reproduces and transforms those structures in interactive response to the problems posed by changing historical situations.’ The duality of structure and agency becomes important when it comes to change and the structuration theory sees agency as important in facilitating any kind of social change. Decisions to act according to Mestrovic (1998) are seen as consciously and unconsciously creating agency within the social structure.

This structuration-agency theory was used as a basis for the study in addition to the theory of social organisation. Social organisation is seen as referring to as patterned social interaction and in these social interactions, social actors are portrayed as co-operating to produce a stable social structure which is characterised by social relationships (Charon 1986, Wheelan 2005). Sneath (1993) postulates the view that social organisation is best understood through understanding co-operative activities in societies
which are patterned, multiple and fluid. These activities form the basis of social relationships and have their basis on residence, joint resource use, kinship and other principles. Just like the ideas on structuration, social organisation places agency as being at the centre of social relationships which plays an important role in the lives of individuals, families and communities.

For the purposes of the study structuration, agency and social organisation were considered as important and integral in understanding the current circumstances of the youth in urban Harare. Using structuration theory, agency and social organisation it was seen as possible to understand how the youth are using the current social systems, social structures, available physical and non-tangible resources as well as individual and group initiatives to make a living and survive under difficult socio-economic circumstances. The theories were used to show how individual youths use socially acceptable and at times non-sanctioned activities and behaviours to make a living in an environment which at times is unfavourable to their progress and development. Individual youths as ‘agents’ are seen as using their individual and mental capacity to undertake in various money making and at times innovative activities to raise money and they do this through available social structures or at times they defy these structures and do things in their own way as these structures may be seen to be an impediment to their goals and aspirations.

Research Area and Methodology Employed
The research was conducted in the city of Harare focusing specifically on the city centre. The city centre was seen to be ideal as it has diversity and dynamic socio-economic relationships. The study was grounded in an interpretive research paradigm and it employed the qualitative research approach which entailed the use of in-depth interviews, a semi-structured questionnaire (which was borrowed from quantitative research but modified to suit the research), focus group discussions, observations which also included participant observation and the use of secondary data. The total number of persons who informed the study was 60 and this figure was considered to be adequate and representative in a context of financial and resource constraints. Respondents in the study were selected using a multi-stage sampling process and it included random and purposive sampling methods initially which were followed up and complemented by snowballing techniques as respondents made referrals to other individuals whom they felt could assist the study with important information. Different sites in the city where the research instruments were administered were purposively chosen and data was collected, cleaned and analysed in an ethical manner in accordance with international practices in research.

Youth Socio-Economic Realities in Zimbabwe
The research which informs this article was aimed at finding out the survival strategies which the youth have adopted in the backdrop of a challenging socio-economic environment. As stated earlier, Zimbabwe has seen several economic challenges which have been a consequence of various factors and these are seen to have negatively impacted on society especially the youth. The study was especially interested in
unearthing these challenges and the response of the youth to these challenges. In Zimbabwe, the youth population (15-34 years) according to the 2012 National Census stands at 4,702,406 or 36% of the total population of which they are seen as comprising of 56% of the total economically active population (ZIMSTAT National Population Census 2012). The youth thus form an integral and important part of the population who are seen as relevant not only in the present but also in the future of the country. This importance has been seen in the way they have been portrayed in the National Youth Policy (2000 and amended in 2013) and the Zimbabwe Agenda for Sustainable Socio-Economic Transformation Document (which is guiding the country from October 2013 to December 2018). Under these policy documents the youths are portrayed as an important constituency who need to be economically empowered and afforded an opportunity to contribute to the socio-economic development of the country. This has been in the backdrop of Zimbabwe being a signatory of the African Youth Charter effectively binding itself to look out for the interests, needs and aspirations of the youth.

By looking at socio-economic indicators in literature and the media one can see several issues socially and economically in Zimbabwe which can be seen as affecting the youth. The study sought to understand these issues and dynamics and to use them as a basis for understanding the current situation of the youth in the urban areas of Harare. According to the Zimbabwe National Statistical Agency (ZIMSTAT) the unemployment rate in the country in 2011 was 10.7%, 11.1% in 2012 and 11.3% in 2014 (ZIMSTAT [O]). These statistics have been disputed and are of major contention and there is a current debate with the argument that they are not reflective of the true situation on the ground and are based on unreliable data. The contestations on the data are exemplified by Chiiumia (2014) who quotes Morgan Tsvangirai (leader of the opposition Movement for Democratic Change) as saying that in 2014 the country’s unemployment rate stood at 85%. Japhet Moyo the Secretary General of the Zimbabwe Congress of Trade Unions is cited as putting the unemployment rate at 80-90%, ZANU (PF) in its 2013 election manifesto put the unemployment figure at 60% while the National Association of Non-Governmental Organisations in 2011 put the unemployment rate at 95%. The Zimbabwe Labour Force and Child Labour (ZLFCCLS) indicated that the average unemployment rate in the country for those aged 15-34 years stands at 15% while 87% of the employed youth are in the informal sector (ZIMSTAT 2011). ZIMSTAT (2011) indicated that in 2011, 5.4 million (84%) Zimbabweans worked in the informal sector while 606,000 (11%) worked in the formal sector. This is the situation which the youth now find themselves in, a situation of high unemployment and available employment opportunities now only being found in the informal sector. This has occurred in a situation where the educational sector according to the ZLFCCLS (2011) reported that the educational system was churning out approximately 300,000 school leavers a year of which only 10% were being absorbed through employment showing low employment generation capacities by industries.
Youths in Zimbabwe given the scenario depicted above now find themselves in a socio-economic environment which is very much difficult. Despite high educational levels, most of the youth find themselves unemployed and must plan in order to survive. Lack of income can become a source of many social ills like crime if uncontrolled and it brings to the fore social inequalities and social stratification which can be a basis of societal imbalances. It can also be a burden to families, communities and the government as they are forced to provide for an otherwise economically active social group whose capacity to take care of themselves is curtailed by existing socio-economic conditions. Lack of income and effective social support in an unfavourable environment has forced the youth to seek alternative survival strategies to meet their current and everyday needs while preparing them for the future. The situation of Zimbabwean youth is not much different from the youth in other African countries who face similar socio-economic challenges. Due to these challenges, there can be seen initiatives by the African Union to enhance the capacity and efficiency of the labour market in order for it to absorb young people while at the same time developing their ability and skills. It is in this context of socio-economic challenges that the majority of urban youth in Zimbabwe have now resorted to working in the informal sector which is seen offering more opportunities. The section below briefly explores literature on the informal sector in Zimbabwe.

Issues on the Informal Sector in Zimbabwe

Studies on urban income generating activities in Zimbabwe with special focus on residents, governance systems, housing, formal and informal employment, youth and development are so numerous and vast that it is impossible to capture all of the works in this single article. However, it is important to highlight some of the works which can be seen contributing to understanding issues on urban realities, the youth and the informal sector in Zimbabwe which inform dominant debates on the subject which inform this article. The nature and extent of the informal sector in Zimbabwe which has become a refuge for most urban youths is captured by Crush, Skinner and Chikanda (2015) who indicate that in 1980 the Zimbabwean informal economy was small absorbing ten percent of the labour force. In 2003 it accounted for 70 percent of the labour force with its contribution to the Gross National Income having grown to 60 percent. In 2011, 84 percent of the population was employed in the informal sector with the dominant activities being in retail, wholesale trade followed by motor vehicles and cycle repairs then services and manufacturing. These important observations by Crush et al. (2015) bear resemblance and are complimented by observations by Bukaleya and Hama (2012) who cite William (1999), Jenkins (1998) and Kobb (1997) as indicating that 80 percent of American’s find their first job in the informal sector, 97 percent of non-farm businesses contribute to 40 percent of America’s GDP. The informal sector contributes to more than 70 percent of Africa’s labour force and in Tanzania the informal sector alone is seen contribution 90 percent to the country’s GDP and this aptly summarises the importance of the informal sector. Issues raised by Crush et al. (2015) raise important issues to this article and to the debate on the informal sector. Firstly, they raise the issue of whether economic collapse as was experienced in
Zimbabwe can result in the growth of the informal sector while the formal sector gradually becomes much smaller. Secondly with the collapse of the economy and the growth of the informal sector, Crush et al. (ibid) question whether there can be positive outcomes to such a collapse as evidenced by the growth in entrepreneurial and motivational skills in Zimbabwe. These issues are quite important and based on empirical evidence in this article there is an exploration to see the extent which they are applicable in understanding the informal sector and urban youth in Zimbabwe.

The urban social landscape has been extensively researched on and this article seeks to add on to this research while presenting a contemporary outlook to the youth and urban livelihoods in Zimbabwe. An example to existing works on urban livelihoods in Zimbabwe are the works of Mupedziswa and Gumbo (2001) who have undertaken longitudinal studies on the informal sector in Zimbabwe in the years from the 1990’s. The findings in their studies are quite well documented as they show how the informal sector in the country has developed over the years and they touch on the Economic Structural Adjustment Programme and its effects on the economy and labour, the economic crises which the country has witnessed over the years and its impact. Their studies show patterns, trends and differentiation which have occurred on the informal market. They also trace government support and interventions that have been put in place to support the informal sector, its growth over the years, the impact of the informal sector on growth and livelihoods, the role of civil society and banks in the informal sector among other important issues which highlight the importance of the sector as well as its genesis over the years. This work on the informal sector in Zimbabwe by Mupedziswa and Gumbo (ibid) is complemented by the works of Kamete (2004) who cites the works of Mhone (1995). Their works explore the informal sector in Zimbabwe particularly the home industries in urban areas which since independence in 1980 have been seen as developing and are enterprises which are centres of production, industry and commerce in urban areas. Though they are important centres for informal trade they are often seen as areas of illegality and vice and these issues are extensively explored in the works by the two scholars. The works highlighted in this section play an important role in creating a new understanding of the informal sector and its functions as well as challenges in a Zimbabwean set up. They also contribute immensely to the debate on the relevance, importance and contribution which the informal sector can play not only in securing the livelihoods of the people who are employed by the sector but also the contribution which the sector can play in the national economy and how it can be a tool for development.

To understand socio-political dynamics centred around the informal sector in Harare, Kamete (2001 and 2002) explored governance relationships in urban Zimbabwe particularly between the governing and political class and the urban poor. He was able to unearth some very important issues. He shows that despite the recognition of the interrelationship between the central government, local government, private sector and civil society the poor are never recognised or acknowledged as important but they are able exercise some form of power and dictate some measure of control in the flow of events and processes.
They to some extent determine their destiny and put in place tactics and strategies which allow them to survive in a difficult urban environment and have a voice in many important issues which affect them and this is despite the perception which views the urban poor as being powerless, useless and voiceless. Kamete (2001 and 2002) explores these perceptions of the urban poor as being labelled as helpless, as liabilities, as useless and as a resource and he is able to dispel some of these notions. He is able to show the important roles which the urban poor play as well as the power dynamics that exist in urban areas. In a follow up on urban governance issues, Kamete (2007) focuses specifically on the urban youth and the contribution which they are making to governance issues in urban areas which they view as transient and he shows the interesting relationship between the youth and politicians as well as between the youth and technocrats who can be seen conveniently the youth with no prospects of partnerships or the youth being taken seriously as used generally as ‘foot soldiers’ or ‘pawns’ that further the interests of the politicians and the technocrats.

In addition to the works highlighted above there can be found some works which present contemporary issues on informal traders in Harare. The work by Chirau and Chamuka (2013) brings to the fore some of the pertinent issues which affect those that engage in informal income generating activities. Through an empirical study of traders at Magaba in Mbare (Harare) they show that traders are also affected by political issues as well as institutional and organisational issues. They highlight how the urban space has become highly politicised through the police; militia and customs officials who play an important and oftentimes authoritarian role in the lives of the traders. They see the government as deploying these institutions to disrupt the activities of the urban traders such that for the traders it becomes necessary to have some form of affiliation or allegiance to these institutions in order for their business to survive or the urban space to remain habitable to them to be able to undertake their activities. Despite the confiscation of goods, destruction of crops and limited profits due to harassment by these government institutions, Chirau and Chamuka (2013) show that Magaba women are able to engage in productive activities and contribute to household income and food security. Other works on the informal sector in Zimbabwe include works by Njaya (2014) and Dube and Chirisa (2012) who show how there has been an influx of vendors in the Harare Central Business District due to socio economic challenges in the country which has seen constant conflict between the vendors and the City Of Harare especially the Municipal Police who are in constant conflict with the vendors as they seek to enforce the city’s by laws with traders found doing their business all over the city’s pavements, shopping centres, parking lots and at traffic intersections. In his contribution Njaya (2014) shows how important street vendors have become as they have reduced unemployment significantly, increased incomes and through street food vending urban dwellers have access to cheaper, inexpensive and varied traditional meals.

Tawodzera (2010) has explored the urban poor household survival strategies and how urban people have managed to adopt new strategies and resilience in order to survive in an increasingly difficult and
challenging urban environment. He looks at how they are meeting their food requirements and needs under conditions of extreme material deprivation. Other important works which have been done on the informal sector in Zimbabwe include works by Hansen (2004), Grant (2003), Jones (2010), Mujeri (2007) and Musoni (2010) among other scholars and these works have gone a long way in exploring the socio-economic and political dynamics found in urban areas and it is these works which have laid the groundwork for this study which attempts to build on the already existing knowledge base.

Basing on the works done on urban livelihoods in Zimbabwe it can thus be seen that there are many issues and contestations which are at play. In addition to issues highlighted in sections above, Lindell (2010) on the informal sector brings to the fore important issues in Africa on urban areas and the informalisation and casualisation of economic activities and how the informal economy has grown in Africa and attempts are now being made to regulate and bring this growing informal economy under state regulation. The article by Lindell (ibid) brings to the fore one of the most important debates in urban studies which is the issue of how to deal with the urban informal sector which is increasingly growing and thriving in the face of a shrinking state regulated formal sector. There can be seen to be an increasingly fluid border between the two sectors but which is characterised by confrontations which at times are violent between workers in the informal sector and the state. Using various sources Lindell shows contestations that have arisen in the formal sector as exemplified by their forced removal in Lusaka, Zambia as well as in South Africa before the 2010 World Cup and this brings to the fore one of the old arguments in urban studies which is the beautification of the city against the informal sector which includes vendors who are oftentimes accused of making city’s dirty. The holding of premier events like the World Cup with clean up measures being undertaken are usually seen as disguised for the events but they would actually be guided by ulterior motives targeting the informal sector. There can be seen to be existing politics in the informal sector as well as human agency among informal actors which is important for their survival which undoubtedly is very important.

Thus, there are a lot of debates and issues in the informal sector in Zimbabwe and in Africa which literature has captured. The main issue is to locate this research in the context of these contestations and debates on the informal sector. The most important issue is to understand how the informal sector has actively absorbed the urban youth and how they are using it to their advantage to make a living and adapt to a difficult socio-economic environment by socially organising themselves and using their agency. It is this issue which this paper is concerned with.

**Presentation and Discussion of Findings**

In the face of a challenging socio-economic as highlighted in previous sections of this paper, the study found out that young people in Harare are engaging in various income generating activities in order to raise money for their livelihoods. In the different activities, which they undertake they are seen as using...
social structures, their own agency or socially organising themselves to be in a position to generate income. Through this positioning, they can be seen to be engaging in various economic activities which are briefly outlined in sections below.

**Car Washing as a Survival Strategy**

Washing cars has become a popular business that young people are undertaking in Harare city. Cars have always been there in Harare with car washing being done at homes by children as a domestic chore or by domestic employees but this is gradually changing with car washing being done away from homes as a business in the central business district. This is in a context of an influx of cheap imported second hand vehicles from Japan. In Harare, young people can be seen washing cars in car parks, parking bays, on the streets and in bus terminus around the city. Youths who are undertaking this activity indicated that one just needed to identify a busy place with high visibility to motorists to set up the business and there was no need for any paperwork or payments to the city council or tax to government as these car washes are not registered. For these young people this is an important issue as it ensures that they realise higher profits. Not much capital is needed to start the business with one needing buckets, access to water (which is usually drawn from council tapes at no cost), detergents, brushes, cloths and wax polish. Those who would have been in the business for longer can be seen having vacuum cleaners, pressurised pumps and generators which they use to clean cars in the interior and on the outside. The youth who are into this business can be seen working as individuals or as groups usually in two’s or threes. Information on youth engagement in the car washing business was provided by Simba who is a young man aged 19 who runs his 'car washing business along Harare’s Speke Avenue at a parking bay. He indicated that he had chosen this business after 5 years without employment after leaving school. Having tried his hand at several things he had settled for the car wash business after noticing some young people who were doing it who seemed to be making ends meet with money which they were generating. He had also noticed that there was a high influx of cars mainly from Japan in the city centre and having people not having the time to wash their cars it was for him an excellent business opportunity. Starting with only 2 buckets, washing powder, mutton cloth, ‘a couple of lemons’ and free water from the nearby public toilet he had seen his assets grow to seven buckets, two drums, 6 brushes, 2 vacuum cleaners and a pressure pump. He now has 2 assistants who are helping him to wash cars on a full-time basis and he has managed to rent a small place at the backyard of shop where he keeps his equipment. Charging on average between US$3 and US$5 per vehicle with prices being negotiable and going down to as little as US$1 for a simple wash without polishing, Simba indicated that he usually took not less than US$15 a day after sharing with his assistants, paying the municipal police at times (to turn a blind eye) and rentals. In addition to doing the car washing business, Simba was seen also selling airtime, cigarettes and directing cars into parking bays for a fee ranging from US$0.50 to US$1 depending on negotiations with the driver and they were usually paid extra to ensure that vehicles were not clamped by the municipal authorities for not having the requisite parking permits. Through the car washing business he indicated that he was managing to take
care of his family comprising of a wife and a child and to rent a small room in the high-density suburb of Dzivarasekwa.

Across town at the Fourth Street bus terminus there was Tatenda, a 31-year-old man who was washing cars usually the commuter omnibus taxis at the terminus. For him the business was an important means for survival and unlike Simba he did not have much equipment except his 1 bucket and a few detergents, cloths and brushes. His target business was the commuter buses which would be in a queue on the terminus waiting for their turn to load. For anything between US$1 and US$3 he was given jobs to clean the cars and on a good day he could clean up to 11 cars but this differed depending on how busy the terminus was. With the money from the car wash he indicated that he was able to take care of himself and rent a room in Epworth. His family which comprised of a wife and four children was resident in the rural areas of Mutoko at his rural home and he said that he was managing to feed and clothe them with the little money which he was making from the car washing business.

A casual walk around the city indicated that there were many young people who were running small car wash businesses around the town and their changes to clean a vehicle ranged from $1 to $5 depending on the negotiations made between the two parties of the car owners and car washers. While car owners were busy in their workplaces, shopping or attending to other business in town they would leave their cars at the car washes where they would be given a thorough cleaning and polish. Their work is so informalised that it is done in total disregard of the city’s by-laws with law enforcement agents seen as being given a small ‘cut’ by the car washers to turn a blind eye. Over time it was due to frequent visits to car washes it was noticed during the study that there have developed strong relationships between car owners and those who was cars with car owners showing a lot of trust for the car washers whom they leave their cars with and they can negotiate credit in cases where they do not have cash with them and pay later.

**Foreign Currency Trading**

Foreign currency trading is also a popular money making venture which young people can be seen engaging in Harare. Observations showed that foreign currency traders are mainly concentrated at the Roadport bus terminus and the nearby Fourth Street bus terminus as well as the Copacabana bus terminus and the Eastgate shopping mall in Harare CBD. Holding batches of cash comprising of South African Rands and United States Dollars these foreign currency dealers are easily recognisable with their catch phrase ‘tokupai ma rands kana madollars here’ (can we give you rands or dollars). Mai Tanaka who is a 29-year-old woman trading in foreign currency at the near the Eastgate mall indicated that selling foreign currency for her was a means of making ends meet after years of unemployment having lost her job three years earlier. She indicated that they took advantage of loopholes in the formal foreign currency system in the country and their main customers are people who are travelling to and from South Africa or
those have relatives in the Diaspora who are remitting money home which needs to be traded so that it can be used in the country. She indicated that she made profit for example by buying the South African rand at US$5.50 for a R100.00 note which she in turn sold for US$6.00. The key was that she provided a link between those who wanted a particular currency and those who wanted to dispose of it. She said she had her *ma big dhara* (big men) to whom she provided foreign currency and on average she would take home around US$15 as profit but this changed depending on supply and demand of the foreign currency. With the money she was making, she indicated that she was able to send her child to school, take care of herself and her parents and rent 2 rooms in the Mufakose high density suburb (in Harare). She indicated that the business was being negatively affected by the very high number of people who were trading in foreign currency whose number continued increasing due to high levels of unemployment in the country. She indicated that some of the people trading in foreign currency were just employees of even bigger persons including business people and politicians who were the ‘real’ owners of the money while others were in fact working as groups or associations scattered all over town who shared profits after a certain period. Observations from around the city indicated that quite a large number of young people are trading in foreign currency in the city centre where they can be seen seated or standing at different places holding large bundles of cash.

**Chihwindi (Touting)**

Chihwindi is another popular money making strategy which young people were seen to be engaging in. *Chihwindi* involves people known as *mahwindi* (touts) working at designated bus terminuses or undesignated or illegal terminuses popularly known in Harare as the *mushikashika*. At these pick-up points for commuters the hwinds can be seen being very active in calling and seeking customers to board the commuter buses or cars so as to be transported to different destinations. Although touting has been in Harare for a long time now having originated from the popular Mbare Musika Bus Terminus which was created under colonial rule, the challenging socio-economic conditions in Zimbabwe have taken touting to a whole new level. Observations around the city centre showed that there are a high number of the *hwinds* in town despite several attempts to get rid of these people who are associated with harassment and abuse of commuters looking for transportation or people who would be doing their business in town. Interactions with *hwinds* operating along Robert Mugabe Street and the Copacabana bus terminus in Harare revealed a lot of issues on the touting issue in the city centre. Two *hwinds* Tichaona (aged 23) and Ras Weli (aged 34) indicated that touting is a job just like any other job. It involves them being in charge of a commuter loading or drop off bay where vehicles would come to pick up passengers and provide transportation to different destinations. As the owners of the place they charge an average of US$0.50c to a US$1 per vehicle which would have picked passengers and this was dependent on the time and how busy it was with peak periods being more expensive. Their duties included loading the vehicles and keeping a look out for the municipal police, traffic police and the Vehicle Inspection Department which have vehicle and personnel regularly patrolling the streets and impounding
vehicles that are not roadworthy and those which pick up passengers at these illegal loading bays. Tichaona and Ras Weli indicated that they keep a record of all vehicles that would have loaded and depending on the loading bay and the agreement between the *hwindi’s* they either share the money at the end of the day or each *hwindi* is allocated vehicles during the day which they load and the money which they receive is theirs. The daily takings differ depending on how busy it is but according to Ras Weli he averages between US$10 and US$12 a day and this is subject to how busy the day is and his brushes with law enforcement agents whom he said he ‘greases’ with anything between US$1 and US$5. Observations around the city showed that *chihwindi* is very popular among young males in the city. They are especially evident in places which were once set aside for the transportation of the public by the City Council in the city centre which have since been changed but which remain accessible and convenient to the public who would rather use these illegal points. The *hwindi’s* can also be found along the main roads leading out of town and at the different bus terminus were they are very active in calling out destinations. For Tichaona and Ras Weli, *chihwindi* has meant that they are able to feed themselves and their families and to rent accommodation in Warren Park and Tynwald (suburbs in Harare) respectively.

**Vending**

Vending is the most popular income generating activity which the youth are undertaking in the city centre of Harare. Vending is also an income generating activity which has roots in colonial and post-colonial Zimbabwe. Previously it was regulated and tightly controlled by municipal authorities and usually restricted to the outskirts of the city centre but as will be shown below this has gradually changed. In contemporary times, vending in the city centre has included the selling of vegetables, fruits and other food stuffs as well as the selling of new and second hand clothing as well as other non-edible items. In 2015 there was a proliferation of vendors in the city centre when there was a relaxation of the city by laws resulting in thousands of vendors invading the city centre and trading their different wares. This decision was later reversed with vendors being ordered out of the city and being allocated places of trade usually on the outskirts of the city. These alternative areas of trade offered by the municipality have been rejected as vendors argue that they are not viable for business as they are far from customers and they lack social amenities. This resistance has fuelled illegal vending in the city centre of which a large number of youths are involved. Vending in the city centre of Harare by the youth has seen some of them applying and being allocated market stalls at designated markets while others have tended to trade illegally in the city centre where they are continuously on the lookout of the municipal police who at times seize their goods and arrest them. The majority of vendors operating in the city centre are not licensed and they sell their goods at undesignated areas making them to be in danger of arrests or seizure of their goods which can lead to huge losses. During the study, it was noticed that these illegal vendors whose majority are young men and women usually come into the city centre and sell their products after 4pm when they know that there are many potential clients in town and the municipal police officers would have knocked off work. Their
goods would be displayed and laid down on the pavements on sacks or cardboard or in two wheeled
carts popularly known locally as the (ngoro). When the municipal police carry out raids vendors can be
seen running and hiding their goods and trying their best to evade arrest.

At the Charge Office flea market in Harare, there can be found a young man called Amon (aged 30) who
trades in mabhero (second hand bales of clothing) which he gets from Mozambique as well as new
clothes, shoes and toiletries which he buys from Musina, South Africa. At his market stall, which
comprises of a table for which he pays a daily rate $15 he has two other people whom he shares with in
order to minimise his costs thus the daily rental for the table is $5 for him. He has an assistant who helps
him to sell his wares and shout out to customers so that they know what is on sale and what he has to
offer given the stiff competition in the flea market where there are over a hundred tables. His monthly
profit ranges between US$150 and US$200 but it changes depending on his ability to sell and the
demand for goods. Through this business, he manages to rent a house in Glen Norah in Harare and look
after his family of four as well as his extended family. Amon indicated that vending either in town or in
busy areas is highly politicised with those who have access to stalls being in the ‘correct’ party which is
ZANU (PF) and being active in the party structures. For him being in the party has had direct and indirect
benefits of which having access to the table has been one major benefit. He indicated that the majority of
the people who owned market stalls were influential politicians or businessmen who rented out the stalls
to traders thereby realising a profit without putting much effort or even selling a single thing.

Rudo who is a young woman aged 23 is another young person who is into trading in the city centre but
her business is very much different from that of Amon. She sells bottled water, sweets and freezits (ice
cools) at the Market Square bus terminus in Harare, carrying them in a pack and selling them mainly to
passengers who frequent the terminus for transportation to different destinations. Vehicle drivers and their
conductors are also some of Rudo’s big customers. Rudo has never been formally employed before and
has been vending since the age of 15 after dropping out of school due to lack of money for school fees.
She does not pay anything for fees or licences and the expenses which she has are for storing her
products in the fridge at shops nearby and paying off municipal police who sometimes arrest vendors in
the city centre. For Rudo expenses are not much and profits on a daily basis range from US$6 to US$8 a
day. She had to say the following about her business and life in general:

Life is tough there are no jobs and it is worse for us without an education. I have to sell these things
here at the terminus but the money which I make is very little it just is enough to try and make ends
meet. This bottled water here gives me a profit of US$0.10 so you can imagine that I have to sell ten
just to make a dollar. With changes in weather when it is not hot, sales are very low. I live with my
husband in Mbare; he too is a vendor so with the money which we make we combine and try to stretch
it to meet our expenses but it is not easy. I know I am not educated but I wish I could just get a job so
that I don’t do this hustling for customers and I am guaranteed of a salary at the end of the month.
In addition to packaged products, fruit and vegetables it was noted that young people are also selling beef, fish and chicken pieces on the streets of Harare. The meat can either be raw or cooked depending on individual preference. This is in violation of the by-laws of the city as well as health standards and normally this product should be sold under hygienic conditions in butchery. One of the vendors Sarudzai (aged 33) who sells fish and chicken outside OK Supermarket at the corner of Albion and Mbuya Nehanda Streets in Harare indicated that they are forced to do it because ‘zvinhu zvekaoma hanzvadzi unotokiya-kiya kuti zvifambe’ (things are tough my brother you must do what you must do to make ends meet). She orders fish from Norton with other women as a group and a bucket costs them between US$15 and US$20 depending on the season and it is shared equally among them. The fish are then sold for US$1, US$1.50 or US$2 depending on their size to people who would be passing by. In addition to fish, chickens are also sold by Sarudzai costing between $6 and $8 a bird. For those who do not want the whole bird chicken pieces are sold costing US$1 for two drumsticks or wings, US$1 for 10 Chicken necks and feet and US$0.50 for half a cup of chicken intestines. Sarudzai indicated that they are part of a larger market chain of a small and unique chicken market which has young people breeding chickens at household level in communities like Warren Park, Kuwadzana and Highfield. These people purchase day old chicks for between US$60 to US$80 for 100 and they rear them until they are fully grown. They then slaughter the chickens and sell them in bulk to the vendors and the prices of the chickens differ depending on their size but usually they did not cost more than US$5. The market chain was seen as allowing for cash to flow between consumers, vendors and breeders at reasonable prices which Sarudzai said was favourable to all people in the market chain in the face of a challenging socio-economic situation.

In addition to chickens, Sarudzai also indicated that they occasionally sell zvihuta (quail birds) or their eggs. Further probing about these zvihuta showed that they are now very popular in the country with people of all ages scrambling to rear them and sell their meat and eggs which are said to be nutritious and possessing healing abilities for diseases like cancer and diabetes. The birds are being bred in bulk in incubators in the Warren Park Suburb of Harare were their chicks are sold in batches of either 25, 50 or 100 at US$1.40 each while slaughtered birds cost between $3 and $5. Demand for the zvihuta is said to be high from individuals, hotels, restaurants and supermarkets. They are then bred as chickens and sold with vendors like Sarudzai taking advantage of capturing them for resale to both meat and eggs or sold to individuals and companies making a profit out of it. According to Sarudzai and basing on investigations undertaken by the study, zvihuta have become an important source of income generation by young people in Harare who are using them to increase their income and exploiting the high demand for the birds.

Other young men and women can be spotted around town in the later of hours of the day roasting gizzards, maize, chicken livers, chicken feet and chicken intestines around town on small stands using
charcoal. These stands are very common close to bars and nightclubs as well as bus terminuses where there was seen to be a large customer base with many people buying the roasted meat and maize. On enquiry, they indicated that they sell their products for between US$0.50 and US$2 and the profit which they were receiving from the sales was fairly reasonable but one could not solely depend on it therefore there was need to diversify into other activities like vending foodstuffs or selling airtime. Additionally, outdoor cooking spots have become very commonplace at different places in Harare were young women and men cook *sadza* or rice and target workplaces and places where people drink beer. They usually have unique dishes of *mazondo* (cow feet) or *zvemukati* (offals) which are popular with clients at US$1 for a plate.

The three mobile phone operators in Zimbabwe namely Econet Wireless, Netone and Telecel have also given a lifeline to young people in Harare with every corner and the majority of shops in the city centre having vendors who sell airtime. Many young people can be spotted at corners and street intersections wearing reflective yellow or orange bibs with the names of the service providers indicating that they sell the airtime. The vendors will be very busy looking for customers and there is stiff competition for customers. The airtime vendors buy their airtime in bulk and sell it as singles for a profit and an airtime voucher costing US$1 can give them a profit of between US$0.08 to US$0.10 and the more the airtime which one sells determines how much one realises as a profit. Mandebvu who is an airtime vendor aged 24 and sells his airtime along Samora Machel Avenue at the Karigamombe Centre in Harare indicated that the airtime vending business is not too lucrative but it can boost one’s income especially during month ends but it has its challenges especially these days when there are too many vendors selling the airtime. Profits from vending differ but according to Mandebvu they are not enough for one to depend on for a living. One has to have other activities which bring in money and to show this Mandebvu had his *ngoro* which was full of bananas which he was selling and additionally he was also selling sweets, flags, belts and deodorants. Mobile phone operators have also given young people in Harare another opportunity by providing them with the chance for them to become agents for their mobile money transfer operations. In every corner and on every street in Harare there can be seen these money transfer agents operating under Ecocash, Telecash and OneWallet brands. For one to become an agent they need to meet minimum requirements as per the requirements of the mobile operator and if they meet the requirements they are given the go ahead and necessary hardware and documentation to begin operations. The agents are given a commission for each transaction in which a person can send or receive money using the agents and basing on observations done during the study it was seen that in addition to selling airtime for mobile phone operators, money transfer agents who work independent of the mobile phone operators have also become an important feature of youth employment in urban Harare.
Application Uploading and Phone and Computer Hardware Sales

Toisa watsaap (we can upload WhatsApp), screen guard foni yese idollar (screen guards for all phones available at US$1, ma earphones ma earphones dollar for two (earphones available at US$1 for two), to flasher mafoni (we can flash your phones), ma pouch ma pouch nema face ne ma cover emafoni (pouches pouches and phone covers) are some of the popular phrases which young people will be seen shouting to prospective customers along most busy pavements in Harare. In addition to shouting some will be holding cardboard boxes were the services which they offer will be written. The phrases are used to lure potential clients to services which are offered by these young people which include uploading and updating applications on mobile phones like the popular WhatsApp, placing screen guards on phones to protect their screens, flashing and repairing mobile phones which would not be performing well and selling all kinds of mobile phone hardware as well as computer hardware and software to the people. With android phones now being available to the majority of the people and their constant need for software upgrades and application installation, the mobile phone business is now more popular than ever before. Roads in central Harare like Jason Moyo, Cameroon Street, Robert Mugabe Road, and Mbuya Nehanda Street among others are quite popular with these young people who offer mobile phone and computer services. The study on this money-making initiative by the young people showed that they usually rent an office as a group with each individual person concentrating on their own line of business. The young people usually have a desk and either a laptop or desk top computer which they use to serve their clients.

Given the demand for mobile phone applications like WhatsApp and lack of knowledge by some people on how to upload, activate or update these applications the youth indicated that they are able to make money offering the service.

Wilson who is a young man aged 29 operates along first street in Harare and indicated that he charges between US$2 or $3 to upload popular mobile applications like WhatsApp, Photo Collages and Facebook which cost him between US$0.50 and US$0.70 to upload making him a large profit. He also puts screen guards on phones at a cost of US$1 and sells earphones for all types of phones which he buys in bulk and he indicated that he realises a profit of 100% from all the sales which he does. When it comes to repairing of phones he indicated that he has limited knowledge and he uses his friends to repair phones for his clients who would have come to his office. For all repairs made on phones he puts a mark-up which acts as his profit. In addition to the mobile phone business, Wilson also indicated that he loads computer software into desktop computers and laptops in addition to buying and selling computers and computer consumables. On top of these services which he offers Wilson is also an agent of the Ecocash and Telecash money transfer systems indicated above and these boost his income and profits as he views his business as being very diversified and offering a variety of services hence when one thing is not performing well he has other things which he can fall back on. For Wilson, working like this is the only means available to him to earn a living as he has tried and failed to secure employment in the past despite having a degree in political science. His situation is very similar to a large number of urban youth
in Harare who provide services for mobile phones including the loading and updating of mobile applications, the selling of phone and computer software and hardware and being money transfer agents. The young people who were interviewed indicated that they work as individuals running their own businesses, as groups who share profits made or they work for someone who would be the owner of the equipment and office space who gives them either a daily, weekly or monthly target of a certain amount of money which they must pay to him or her.

**Multi-level Marketing**

The use of the multi-currency system in Zimbabwe has attracted a lot of international companies and brands in the country who are attempting to also reap some kind of benefit from the system. In Harare, there can be seen to have arisen a new type of business model or strategy known as multi-level or network marketing which has been joined by a significant number of people. Scornfully referred to as a new brand of a pyramid scheme in the country, the multi-level marketing system has nevertheless been a hit mostly among young persons who are either formally or informally employed or those who are unemployed. Sibongile who is a young lady aged 25 exemplifies a young lady who is passionately into multi-level marketing. In an interview, she indicated that she has been doing this multi-level marketing for 2 years in addition to her hair salon business and she is the one who explained the concept of multi-level marketing. She explained that the multi-level marketing system involves the sale of products to the public with health and beauty products being the most popular. She said that it involved the marketing products by any means necessary usually by word of mouth while at the same time recruiting potential marketers or distributors as well as selling the product to the public for a commission. For all the sales, which those recruited distributors make, a percentage or commission will go to those who would have recruited them and in time with more recruitments it becomes a large network. With more people being recruited distributors attain higher in rankings which bring them benefits. The ranking system according to Sibongile was in the form of a star system with every star bringing with it different benefits. The advantages of engaging in this kind of business was said to be that it did not limit the amount of income which was paid to an individual for example when compared with corporations and the more hardworking an individual was in recruiting distributors the higher the income. There was also seen to be continuous income flows if one had developed a high distributor network with income from commissions flowing in even when one was preoccupied with other businesses.

Observations carried out through the city indicated that the multi-level marketing system has become very popular with many young people seen attending workshops on the system and soliciting for potential clients and distributors in town. Promises of rewards if someone reached a certain distribution status including trips to China, receiving cash and cars like the Mercedes Benz were seen to be motivators for people to join the marketing networks. Green World International with its natural health products, Forever Living, World Ventures and Table Charm are some of the popular companies which were seen being
active with young people working for them as distributors and those who work in these networks are distinguishable by their neat apparel including suits with the logos of the companies in the city centre. Although Sibongile could not divulge the exact amount of money which she was making a month as she indicated that it was dependant on the level which distributors in her network worked as well as her efforts, she said she averaged between US$150 and US$250 each month and claimed that those who have large networks can gross up to US$5000 a month although this could not be verified. For Sibongile she indicated that the work which she does and the income which she receives from the multi-level marketing is important as it helps her to meet her expenses and to support her husband to take care of the family. The income is seen as going a long way in feeding the family and extended family and Sibongile felt that multi-level marketing was important and making a huge difference in her life.

Other Income Generating Initiatives

In addition to the different activities mentioned above there can be seen to be other diverse activities which the urban youth in Zimbabwe are seen as doing in order to earn that extra dollar in the face of the challenging socio-economic environment which is prevailing in the country. During research in Harare, some of the youth in addition to other income generating activities indicated that they belong to credit groups known as mukando or they run money lending schemes known as chimbadzo. Under the mukando system they indicated that they form a group and depending on agreed terms and conditions they provide a certain amount of money to the group on a daily, weekly or monthly basis with the total money realised being availed to a single member with each member being given a chance to benefit from the lump sum cash payments in rotation. The money availed to members is for them to do as they please and members of the mukando groups indicated that it helps them meet their expenses and it acted as a kind of informal banking system which was good as it did not have exorbitant service charges. On the other hand, the chimbadzo system functions in such a way that a person who has money will lend out money to those who are in need of it but the money has to be returned with an agreed interest on top. In Harare those who indicated that they give out money through chimbadzo charge interest of between 20 to 50 percent and they usually hold on to items as collateral which they sell in the event that there is failure to pay. In addition to these there were seen to be young people who sell pirated music and videos mostly from international artists with local music and films not being displayed on their stalls due to fears of arrest and anti-piracy initiatives by the local artists although it was noted that if one requested for local material it was readily available and this business was considered to be quite lucrative.

Some of the youths were seen to be into music especially the new dancehall music which has taken the country by storm. Those who are into this music indicated that they are being rewarded for their efforts through selling their music and performing at live shows but they were experiencing challenges due to piracy and unwillingness by the general population to pay for their music preferring free downloads and sharing of the music on social media with nothing coming to the artists. Some youth in the city centre
were seen engaging in illegal activities which included participating in the smuggling, buying and selling of the cough syrup BronCleer popularly known as *bronco* which has become a hit in Zimbabwe and is being used as a drug which produces heightened psychological effects. A lot of youths were seen to be involved in trading this product which is very popular and in high demand with young people abusing it and those who were trading in it were seen to be making a lot of money from it. A bottle is being sold at US$2.50 to US$3 and it was an advantage to the traders given the weak exchange rate between the United States Dollar and the South African Rand where it was being purchased at R30. Profits were being realised from this product especially from those who were trading it in bulk and this was despite its negative effects on individuals and communities. Lastly another money-making craze which was observed as having hit the urban youth was gambling. There was seen to be a proliferation of sports betting shops in the central business district of Harare and these shops were seen spreading their wings to the high-density suburbs. Some of the youths indicated that they are making a living out of sports betting with bets being placed on football matches, horse racing and greyhound racing. Knowing the processes and being calculative was seen as important with some individuals claiming to average between US$30 and US$100 a day after betting which they were using to take care of their families and meet their needs. There were observed to be some individuals who are not engaging in any form of income generating activities but who spend their days at the sport betting shops and betting on different competitions hoping to cash in if their bets are correct.

**Conclusion**

Such are the different ventures which youths are undertaking in a bid to make a living in Harare urban. The activities which the young people are undertaking support the point of view in dominant debate that the informal sector in developing countries like Zimbabwe has become very important as a form of livelihood in the face of non-absorption of the citizens by the formal sector especially young school leavers. Although this article has not touched on all the different activities which the urban youth are engaging in order to make a living in a challenging socio-economic environment or to explore critical debates on youth employment and informal economic activities it has attempted to exhaustively explore contemporary informal activities which the youths in Harare are resorting to in the face of socio-economic challenges and there is need for further studies and analysis. The study has however brought to the fore some of the survival strategies which the urban poor are employing just to earn an extra dollar in urban Harare and it has shown the different political dynamics and contestations which similar studies have highlighted as existing in urban areas characterised by informal activities. The different ventures which the urban youth engage in show how important social structures, social agency and social organisation are in any social system. Given the realisation by the urban youth that the socio-economic system in the country will remain difficult and challenging for a long time to come the youth are seen analysing the social structure and social systems which are in place and they employ socially acceptable and at times unacceptable means to undertake different initiatives which provide them with a means of income.
Economic hardships are seen as stimulating and developing agency in the youth which they use to come up with innovative means to make a living. They are seen as studying the situation in the city centre and capitalising on available situations and opportunities. In addition to their own individual initiatives, the youth are also seen organising themselves as small groups or co-operatives which they use to set up their different initiatives which generate income for them. Undoubtedly these initiatives support the sociological theories of structuration, agency and social organisation as postulated by Giddens (1984). Evidence from the field supports the view that these theories are not just abstract ideas but they can be seen existing in real life situations. In the face of a difficult socio-economic environment the youth in the city of Harare have developed and adopted diverse livelihood initiatives which are making their lives move forward and they have displayed amazing resilience in the face of challenges.

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Sustainability of Rural Entrepreneurship as a Livelihood Strategy in Zaka District, Zimbabwe

Gerald Guta¹, George Vhudzi and Bernard Chazovachii

ABSTRACT: Rural entrepreneurship emerged as a panacea to persistent hunger and starvation that hindered community development in Zaka. This was exacerbated by the economic downturn, in 1999-2008 period which affected Zimbabwe due to the political stalemate that led to hyper-inflationary environment, income deficit and rampant unemployment. A mixed method approach comprising questionnaire survey, interviews, focus group discussion and observation were conducted to 100 randomly selected entrepreneurs to assess the sustainability of rural entrepreneurship as a rural livelihood strategy in the district. Analyzes was done using Tesch interactive model of data analysis aided by descriptive statistics. Findings revealed that more of necessity–driven entrepreneurial activities were more prevalent than opportunity–driven ones. Despite the fact that the majority were preoccupied with these activities, sustainability is a function of social capital maintenance, economic capital, environmental and institutional alignment among entrepreneurs. The human, social, financial, natural and physical could not manage to influence or allow them to access resilient and sustainable livelihood strategies that would give positive livelihood outcomes that bring intra and inter-generational equity. Therefore, need is there to establish financial, social, technical, economic and institutional linkages with the already establish organizations for the sustainability of entrepreneurship in rural Zaka.

Keywords: efficacy, rural entrepreneurship, sustainability, livelihoods sustainability

Introduction
In most Sub-Saharan African countries, poverty is a chief source of countryside entrepreneurship. 'In Zimbabwe, rural entrepreneurship dates back to the colonial era. For instance, from 1890 to 1894 the Shona rapidly expanded their acreages and diversified into growing maize as a staple diet for sale to the mines' (Wild, 1992). Rural entrepreneurship in Zimbabwe was exacerbated by the economic and political

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instability of the colonial period. Wild (1992) stated that when the Zimbabwean economy was hit by the great depression between 1930 and 1935 the number of self-employed Africans increased remarkably. This drove many African labourers out of jobs into self-employment and at the same time increased demand for cheap goods. Many people turned to rural small businesses as an endeavor to meet their day to day needs. With the positive reports in China and Bangladesh, not much has been revealed in Zimbabwean rural areas, especially after the 1999 economic downturn and the inception of indigenization and empowerment policy which necessitated entrepreneurship since the majority of the people in Zimbabwe are unemployed. Although entrepreneurship brought good to people’s livelihoods in countries like China, Bangladesh, the idea of sustainability of the livelihood strategies brought by entrepreneurship has not theorized in Zimbabwe and Zaka district not an exception. It is on this premise that this study sought to assess the sustainability of rural entrepreneurship as a rural livelihood.

**Conceptualization of entrepreneurship and sustainability**

Barringer and Duane Ireland (2013) revealed that the word entrepreneur derives from the French words, “entre” which means “between” and “prendre” which means “to take”. It is originally used to describe people who, “take on the risk” between buyers and sellers. Vyakarnam (1990) defined entrepreneur as someone who, if given a set of opportunities, could win through, irrespective of constraints and hazards surrounding him/her. The latest 2010 Global Entrepreneurship Monitor (GEM) covering 59 countries defined an entrepreneur as someone who started a new business during the year or who ran a business that was less than three and half years old and was still economically viable (Bohoney, 2011). Rural Poverty Report (2001) revealed that a staggering 75% of the world’s poor are living in rural areas. The majority will remain so, for several decades since resources and policies continue to be biased in favour of urban development (IFAD, Rural Poverty Report 2001, IFAD, 2002). This has numerous negative impacts on rural livelihoods now and in the future. It further stressed the need to develop poverty reduction strategies and policies with emphasis in rural areas. Rural entrepreneurship development has been promoted as a vital and effective component of livelihood development, productivity and growth (Ozgen and Minsky, 2007). Rural entrepreneurship occurs in economically depressed areas with inadequate infrastructure, economic stagnation, low educational levels, unskilled workers and a culture not supportive of entrepreneurship (Kulawczuk, 1998). The Global Entrepreneurship Monitor (GEM) indicated that, in countries where there are low levels of Gross Domestic Product (GDP) there are high levels of necessity-driven entrepreneurial activities. In those nations of higher income, it is individuals with higher human and social capital that are attracted to entrepreneurship because of perceived opportunities for wealth creation (Kingombe, Bateman and Willen le Velde, 2010). In more economically developed countries (MEDCs) like the United Kingdom, the rural entrepreneurship among farmers in Cambridgeshire made a substantial contribution to enterprise and employment (Carter, 1998). In China, Township, and Village Enterprises (TVEs) played a critical role in its development. Due to rural entrepreneurship, China’s economy has grown at a steady rate leading to a dramatic improvement in living standards. This growth
has fuelled unprecedented poverty reduction: the share of the poor declined from 65% in 1978 to 7% in 2007. More than 400 million people have been extricated from the jaws of wrenching poverty (Chitambara, 2011). In agrarian and largely subsistence economy of Bangladesh, rural entrepreneurship plays a crucial role to supply nutritious food and to generate income and employment. It improved standards of living and reduced gender disparity (Kabir et al., 2012:265-266).

“Sustainability as defined in Agenda 21 has four dimensions: the social, economic, environmental and institutional one, reflected in the four categories of indicators chosen by the Conference on Sustainable Development” (Spangenburg, 2002:8). Whereas the environmental dimension is the “sum of all biogeological processes and their elements (environmental capital from economists’ point of view)”, the social dimension (social plus human) is difficult to define. Individual human beings, their skills, dedication, experiences and the resulting behaviour are its focus, with the borderline to institutions (as an achievement of human interactions, confusingly called “social capital”) not always easy to draw. Institutions are understood as including not only organizations, but the system of rules governing the interaction of members of a society as well. This kind of societal interaction and the social norms behind are necessary preconditions for economic activities, which they shape (www.circularecology.com, 2015.06.12). Apart from that, the economic dimension (physical capital) has been identified as one of the society’s subsystem, that enables the institutional, social and environment to propel. Separating these four dimensions may distort the real world integration. Only a balanced economic, social, environmental and institutional aspect can achieve true sustainability (www.circularecology.com 2016.06.12). To maintain and enhance sustainability, the focus must be on economic, social and environmental subsystem. A sustainable way of mutually reinforcing the four capitals must be made to avoid deadlocks. Therefore, entrepreneurs should have these capitals for them to have the ability to continue a defined behavior indefinitely.

This study employed the sustainable livelihood approach in Figure 1 which entails that a livelihood should be able to recover from “stress and shocks” and at the same time “maintain and enhance” “capabilities and assets” into the future. A central element in this “resilience” to stress and shocks is the diversification of elements that comprise “livelihood.” (Morse, McNamara and Acholo, 2009). Entrepreneurship has been found to be a livelihood that would transform depressed communities. Communities that have undergone stress due to persistent drought, unemployment and political instability need a diversified approach to broaden the opportunities and potentials of the depressed.
In an attempt to make a living, people use a variety of resources such as social networks, capital knowledge and markets to produce food and marketable commodities to raise their incomes, (Herbinck and Bourdillon in Chazovachii et al., 2012). When linking it to rural entrepreneurship, entrepreneur represent individuals who assemble resources, labour, materials and other forms of assets to productive use for value added motives at the same time, to propose valuable changes and innovative ideas in order to earn a living (Baker and Nelson, 2005). Entrepreneurs use untapped or underused resources to create a new service or product, trying out solutions to counteract or subvert the limitations of the local environment, improving through best-fit approaches and learning by trial and error (Di Domenico et al., 2010). The extent of the people to access these resources is strongly influenced by their vulnerability context which includes trends (for example; economic, political and technological), seasonality (for example; prices, production, seasonal changes and employment opportunities) and shocks (for example; natural disasters, epidemics and civil strife). Considering the depression Zimbabwe has gone through since 1999 due political stalemate and unfavorable climate changes, entrepreneurship was broadly taken as an economic opportunity in averting the risks and uncertainties the country is facing. Development is thus about removing obstacles from what a person can do in life, for example; illiteracy, ill health, lack of access to income and employment opportunities, lack of civil and political freedoms (Zimbabwe Human Development Report, 2003). The sustenance of livelihoods could, therefore, make a significant contribution in poverty alleviation whilst protecting environmental resources, (Dovie et al., 2001). Notwithstanding, when such resources are not available and or when they are undermined and or
underutilized people tend to go under stress and shocks, (Chazovachii et al., 2012) leading to environmental damage and then poverty.

In spite of its existence as an economic enhancement process for years, entrepreneurship is regarded as an outstanding concept in developing countries that involves the process of shifting ideas into commercial opportunities for value creation (Melicher, 2009). The extent, to which entrepreneurs have access to partnerships, is also the more likely they are to discover opportunities in rural areas in developing countries (Ozgen and Minsky, 2007). Antoncic and Hisrick, (2003) stated that entrepreneurship has gained enormous global recognition as very significant towards economic growth through a sustained competitive nature with positive financial gains. Entrepreneurship encourages coordination of resources and exploitation of opportunities (Morris, Kuratko and Covin, 2008).

Fostering entrepreneurship is a significant factor in energizing the rural community (Petrin and Gannon, 1997) in impoverished rural regions because the strategy creates wealth and employment. It has a profound impact on the quality of livelihoods of rural populations (FAO Corporate Document Repository in Ozgen and Minsky, 2007). It has, therefore, received immense global recognition across the developed and developing nations because of its influence on economic growth and sustenance (Le and Nguyen, 2009: 286). According to Markley and Low, (2012) rural entrepreneurship can create employment opportunities, contributing additional income and benefits for the local residents, along with the allied multiplier impacts.

Strengthening rural entrepreneurship system will speed up the establishment of self sustained rural communities, increase sources of income, support development of infrastructure, build capacity, revitalize the rural community and make a significant impact in alleviating poverty (Ozgen and Minsky, 2007). However, despite the positives aforementioned by various scholars, the issue of sustainability of the entrepreneurial projects has not yet gained prominence, judging from the dearth of literature of the subject.

Materials and Methods

Description of the Study Area
The study was undertaken in Zaka District, Ward 19. The District is a small holder farming area which lies in the central part of Masvingo Province of Zimbabwe. It is in natural region IV. “Masvingo province is located in the south-eastern part of Zimbabwe and it is made up of seven districts of which Zaka is the chosen study area. The province lie in agro-ecological regions 3, 4 and 5 where average of 650 – 800 mm, 450 – 600 mm and below 450 mm respectively of annual rainfall is expected”( Simba et al., 2012:218). Subsistence farming is the main economic activity. Its soils are generally poor. The area is densely populated. It comprised of 48 villages with one thousand households. A sample of 10% of the total population was selected using stratified random sampling. This sample size consists of rural
entrepreneurs and the beneficiaries of the program. One hundred individuals were selected. Among the selected entrepreneurs, 65 were males and 35 were females.

**Data Collection Techniques**

A mixed method approach was used in this study. Quantitatively, the questionnaire were administered to entrepreneurs and consumers of the products to factor out the rural entrepreneurial activities carried out in the ward and the assets bought since inception into their businesses and social, economic, financial and institutional sustainability of their enterprises. Qualitatively, interviews, observation, focus group discussions were done. The interviews were directed to the Department of Agriculture Technical and Extension Services (AGRITEX), Small Enterprise Development Cooperation (SEDCO) and Ministry of Youth Indigenization and Empowerment who always interact with rural entrepreneurs. These key informants were considered useful in soliciting the resources used by entrepreneurs, goods produced and their use to the community, challenges faced by entrepreneurs, stresses and shocks encountered and countered, social, economic, financial and institutional sustainability of the enterprises. Descriptive statistics and Tesch’s interactive model of data analysis were used in the presentation and analysis of findings.

**Results and Discussions**

**Entrepreneurial Activities**

Nine entrepreneurial activities that operate and each have a corresponding number of entrepreneurs practicing it. Therefore, the larger the number of respondents, the more common or attractive the activity is. The reverse is also true. This again revealed affordability of the resources used in doing the activity. It also explains the level of viability of the project as one beer brewing entrepreneur said;

“Traditional beer brewing, gardening, blacksmithing raw materials are locally available and it does not need much labour and time to reap the fruits”

This was echoed in focus group discussions held by key informants that projects with resources locally available are oversubscribed as shown by the percentage of respondents in Table 1, hence more competition. The viability of such projects is compromised by a number of participants in the system.

Sustainability of entrepreneurial activities is rated on the bases of their ability to maintain social, environmental, economic and institutional sustainability brought about by Spangenburg (2001). Failure by an entrepreneur to integrate the four forms of capital would result in a tragic end.
Table 1: Entrepreneurial Activities and the percentage of entrepreneur in the category in Ward 19, Zaka

<table>
<thead>
<tr>
<th>CATEGORY</th>
<th>ENTREPRENEURIAL ACTIVITY</th>
<th>NUMBER OF RESPONDENTS (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. RETAILING</td>
<td>- cross boarder trading</td>
<td>5</td>
</tr>
<tr>
<td></td>
<td>- vending</td>
<td>6</td>
</tr>
<tr>
<td>2. FARMING/ AGRICULTURE-BASED</td>
<td>- gardening(horticultural crops)</td>
<td>20</td>
</tr>
<tr>
<td></td>
<td>- broiler production</td>
<td>18</td>
</tr>
<tr>
<td>3. MANUFACTURING</td>
<td>- carpentry</td>
<td>4</td>
</tr>
<tr>
<td></td>
<td>- welding</td>
<td>2</td>
</tr>
<tr>
<td></td>
<td>- blacksmithing</td>
<td>15</td>
</tr>
<tr>
<td></td>
<td>- sewing</td>
<td>15</td>
</tr>
<tr>
<td></td>
<td>- beer brewing</td>
<td>15</td>
</tr>
</tbody>
</table>

Source: Author's analysis of research data, (2016)

Sustainability of Entrepreneurship in Zaka

Economic Sustainability

From entrepreneurial activities identified in the district, entrepreneurs are experiencing challenges in maintaining economic capital. Notable challenges from the interview held are financial and market shortages. Not even one is capable of keeping capital intact. Instead of devolving on consuming value added interest, entrepreneurs are devolving on consuming capital itself which tragic. One retailer said

“The socioeconomic challenges are beyond our reach thus why we cannot sustain on entrepreneurship projects”

This concurs with the FGD done with key informants that agriculture produce and manufacturing done in this district alone cannot be resilient to the economic challenges that the country is undergoing. This alone explains a lot about economic sustainability of the three categories, retailing, agricultural based entrepreneurship and manufacturing sector.

Producer-retail price discrepancies in dollars

The relationship between average gardener prices and the retail prices charged by the intermediaries determines viability and sustainability of entrepreneurship. From Table 2, it is evident that the intermediaries doubled and trebled the proceeds of the ordinary farmer to the extent of compromising the success of the resource-poor horticulturalist in entrepreneurship. Tomatoes, leaf vegetables, beans and wheat prices proved beyond doubt the extent to which a subsistence market gardener is manipulated by the intermediaries. However, the eighty percent of subsistence market gardeners revealed that they did not have access to urban and lucrative markets the intermediaries had. They were resource constrained,
especially regarding input supplies and financial capital needed for their operations. This limited the competitive potential of the subsistence market gardener to sustain the production levels of their plots. Poor accessibility to market hampered the sustainability of the subsistence market gardener because of their remoteness.

### Table 2 Producer-retail price discrepancies

<table>
<thead>
<tr>
<th>Produce from gardens</th>
<th>Community garden gate prices (us$/ Kg)</th>
<th>Retail prices at Jerera Zaka market in (us$/ Kg)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Maize</td>
<td>0.25</td>
<td>0.35</td>
</tr>
<tr>
<td>Wheat</td>
<td>0.45</td>
<td>0.80</td>
</tr>
<tr>
<td>Leaf Vegetables</td>
<td>0.10</td>
<td>0.50</td>
</tr>
<tr>
<td>Tomatoes</td>
<td>1.80</td>
<td>3.60</td>
</tr>
<tr>
<td>Beans</td>
<td>1.60</td>
<td>4.00</td>
</tr>
</tbody>
</table>

This resulted in farmers devoting to other categories of entrepreneurship that were already oversubscribed by others. This level of desperation actually revealed the level of vulnerability entrepreneurs are in Zaka district ward 9.

**Social Sustainability**

Retailers, farmers and manufacturers needed to maintain social capital door social sustainability. Findings revealed that entrepreneurs were more into profiting making and accumulating their assets and wealth as their mission than investing in social capital that create basic frameworks for society. Interviews revealed that there was no orientation on the significance of social capital in business. Cooperative efforts were noted among cross-borders traders, venders but market gardeners had no backward and forward links to sustain their business. They had no reliable input suppliers and markets for their continuity. They had no uniform prices. It was ‘each man for himself and God for us all’ attitude.

On manufacturers and farmers, there was no connectedness between members of the group in entrepreneurship, no reciprocal attitude, patience, commonly accepted standards of honesty and ethical values in their practices. Some had moved away from designated stands to mobile trading. This ended up increasing transaction costs due to lack of trust among member in the same business, increased cost of working together as a team due to lack of cooperation. There were no shared values since entrepreneurship was at its infant stage. For those in designated stands, violence was the order of the day, thereby compromising sustainability of vending, carpentry, welding as entrepreneurial activities.
**Environmental Sustainability**

This implies natural capital is maintained both as a provider of inputs and as a sink for wastes. Production rate of wooden materials was limited by limited harvests from Zaka forests. Production of cooking steaks, doors, hoes and other wooden materials was limited by the fragile environment in agro-ecological region 4 that do not have enough woodland for the sustainable productions of wood resources. On agriculture-based resources, community gardens were compromised by the middlemen who was benefiting at their expense. Farmers had better boreholes and dams sunk by NGOs and government, but when it comes to trading, environmental sustainability was compromised by economic sustainability. Welding, blacksmithing was dotted everywhere due to rural electrification. However, the inexperience of welders and blacksmith affected human health. They had no protective clothes for human welfare. The affection of human capital would impact negatively on economic and environmental capital too thereby compromising sustainability.

**Institutional Sustainability**

Institutions are rules and regulations governing the operation of entrepreneurs. Failure to maintain rules and regulations, failure to organize themselves as a team affect sustainability of their projects. Findings revealed that social dissonance was the order of the day due to lack of formal rules and regulations guiding how cross border traders, vendors, gardeners, carpenters, welders should operate. Administrator of retail stand, the local council, manufacturing stands was not monitoring the operations of the system. The local council and the ministry representative of youth indigenization, and empowerment have no enforcement agencies to address any misunderstanding amongst entrepreneurs. This again compromised institutional sustainability of entrepreneurship in Zaka district.

**Conclusion**

Therefore, this article managed to identify entrepreneurship activities categorically classified into three, retailing, agriculture-based and manufacturing. Despite the fact that the majority were preoccupied with these activities, their sustainability is greatly compromised. These activities could have managed to transform rural dwellers from their vulnerability context, but their human, social, financial, natural and physical could not manage to influence or allow them to access resilient and sustainable livelihood strategies that would give them positive livelihood outcomes that would bring intra and inter-generational equity. One could note that entrepreneurial activities in Zaka district are more necessity-driven than opportunity driven. This means, the entrepreneurs are still entrenched. They are still far from celebrating economic sovereignty with is a time bomb for developing countries like Zimbabwe.
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Afrophobia in South Africa: A General Perspective of Xenophobia

Malesela J Masenya

Abstract: The purpose of this paper is to discuss the discriminatory acts of the South African citizens towards foreign nationals. The phobia of losing inter alia job opportunities and market has left South Africa citizens with nothing except to attack expatriates from neighboring countries with the intention of petrifying them so that they can return back home; whilst, these foreigners left their countries in pursuit of economic opportunities. Xenophobia is characterized by a wide range of looting, killing and attacking foreign national homes, shops and markets. In South Africa, xenophobia ascended because of the perceptions of citizens alleging that foreign people are invading their opportunities: employment, markets as well as services amongst other. The fear of foreign nationals taking over in almost everything has led to animosity and greediness. Thus, xenophobic attacks were seen as the only solution to the problem. In that context the paper looks at the general perspective of xenophobia in South Africa focusing on the main reasons why local citizens attack foreign nationals. Furthermore, the paper recommends some strategies that can be used to prevent South Africans attacking foreign nationals. The paper concludes that xenophobic attacks in South Africa are caused by the anxiety and belief of citizens that foreign nationals are taking over what they are supposed to have. Therefore, the paper recommends that the government should work together with the people so that the attacks can be prevented through campaigns amongst others.

Keywords: xenophobia, discrimination, violence and economic opportunities

Introduction

Xenophobia is derived from the Greek words “xenos” and “phobos” which mean "strange or foreign" and “phobia” respectively (Crush and Ramachandran, 2009; Fatoki, 2014). Xenophobia can be viewed as attitudes, prejudices, and behaviour that reject, exclude and often vilify persons based on the perception that they are outsiders or foreigners to the community, society or national identity. According to the

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Concise Oxford English dictionary (2004), xenophobia is an “intense or irrational dislike or fear of people from other countries”. Xenophobia is simply the fear or hatred of foreigners or strangers; it is embodied in discriminatory attitudes and behaviour, and often culminates in violence, abuses of all types, and exhibitions of hatred (Akindès, 2004). The studies on xenophobia have revealed that the hatred to foreigners has a number of causes: the fear of loss of social status and identity; a threat, perceived or real, to citizens’ economic success; a way of reassuring the national self and its boundaries in times of national crisis; a feeling of superiority; and poor intercultural information (Danso and Macdonald, 2000). Xenophobia fundamentally derives from the sense that non-citizens pose some sort of a threat to the recipients’ identity or their individual rights, and is also closely connected with the concept of nationalism: the sense in each individual of membership in the political structure as an essential ingredient in his or her sense of identity (Akindès, 2009). To this end, a notion of citizenship can lead to xenophobia when it becomes apparent that the government does not guarantee protection of individual rights. This is all the more apparent where poverty and unemployment are rampant.

Evolution and Cases of Xenophobia in South Africa

Xenophobia started back in 1980s where the hostilities in the neighboring countries had led to an estimated 250,000 to 350,000 immigrants fleeing to South Africa (Danso and McDonald, 2001). The government authorized refugee status back in 1980s, but they were technically allowed to settle in the Bantustans or (black homelands) created by the apartheid government (Dodson, 2010). However, irrespective of being allowed to stay in South Africa, the reality was more varied depending upon the homeland. With the homeland of Lebowa (Limpopo Province) Mozambican settlers were dismissed outright while Gazankulu (some part Limpopo and Mpumalanga Province) welcomed the refugees with support in the form of land and equipment (Gordon, 2010). Those in Gazankulu, however, found themselves confined to the homeland and liable for deportation should they enter South Africa proper and access to economic resource were also denied (Gumede, 2015).

Xenophobic violence against foreign nationals in South Africa has worsened since 1994 in provinces such as Gauteng, Western Cape, Free State and KwaZulu Natal (Gumede, 2015). There has been this and much speculation of the causes and triggers of the violence. A number of reports have highlighted various issues contributing to xenophobia; some of which include poor service delivery and competition for resources (Harris, 2001). The type of leadership within communities might have an impact on whether or not xenophobic attacks occur in certain communities, which talks to issues of governance. The issue is not only about foreign nationals and their rights, but about the safety of all who live in South Africa. Most incidents of violent attacks have been carried out by black South Africans (Kalitanyi and Visser, 2010; Gumede, 2015). South Africa is Africa’s most industrialized country, and it attracts thousands of foreign nationals every year, seeking refuge from poverty, economic crises and war and government persecution in their home countries (Hussein and Hitomi, 2013). While the majority of them are from elsewhere on the
continent, such as Zimbabwe, Malawi, Democratic Republic of Congo, Somalia and Ethiopia, many also come from Pakistan and Bangladesh. The tendency of perceiving all foreigners especially black African foreigners in South Africa as illegal immigrants is a root concern. This has created a narrative whereby there is a distinction between ‘us’ (South Africans) and ‘them’ (foreigners or makwerekwere) (Gumede, 2015).

Prior to 1994, immigrants from neighboring countries faced discrimination and even violence in South Africa, though much of that risk stemmed from the institutionalized racism of the time due to apartheid (Kalitanyi and Visser, 2010). After democratization in 1994, contrary to expectations, the incidence of xenophobia increased. According to a 1998 Human Rights Watch Report immigrants from Malawi, Zimbabwe and Mozambique living in the Alexandra township in Johannesburg were physically assaulted over a period of several weeks in January 1995, as armed gangs identified suspected undocumented migrants and marched them to the police station in an attempt to ‘clean’ the township of foreigners (McDonald and Jacob, 2005). The campaign, known as “Buyelekhaya” (go back home), blamed foreigners for crime, unemployment and sexual attacks.

Between the year 2000 and March 2008, at least 67 people died in what were identified as xenophobic attacks (McDonald, 2008). In 2000 seven foreigners were killed on the Cape Flats over a five-week period in what police described as xenophobic murders possibly motivated by the fear that outsiders would claim property belonging to locals (Mogekwu, 2005). In October 2001 residents of the Zandspruit informal settlement gave Zimbabweans 10 days to leave the area. When the foreigners failed to leave voluntarily they were forcefully evicted and their shacks were burned down and looted (Morapedi, 2007). Community members said they were angry that Zimbabweans were employed while locals remained jobless and blamed the foreigners for a number of crimes. In May 2008, a series of riots left 62 people dead; although 21 of those killed were South African citizens (Morapedi, 2007). The attacks were apparently motivated by xenophobia. The main reasons behind these attacks were: relative deprivation, specifically intense competition for jobs, commodities and housing; group processes, including psychological categorization processes that are nationalistic rather than superordinate; South African exceptionalism, or a feeling of superiority in relation to other Africans; and exclusive citizenship, or a form of nationalism that excludes others (Schwartz, 2009).

In 2015, another nationwide spike in xenophobic attacks against immigrants in general after Zulu King Goodwill Zwelithini said that “foreigners should go back to their countries”. This led to fuelling of locals looting foreigners’ shops and attacked immigrants in general, forcing hundreds to relocate to police stations across the country. The King claims that he was cited out of context after his attributes led to citizens attacking foreign nationals. Thus, prompting a number of foreign governments to begin repatriating their citizens (Gumede, 2015). The practice and narrative of labeling foreigners as
'Makwerekwere' or the hostile ‘other’ should be questioned and condemned by government and fellow South Africans. Seeing foreigners as the other or outsider in relation to the 'self' can promote a culture of exclusion, rejection and unease rather than accommodation and integration. This can perpetuate a culture whereby the ‘other’ is seen as the existential threat to the ‘self’.

**Causes of Xenophobia in South Africa**

*Public Perceptions and Political Influences*

Reasons for the attacks differ, with some blaming the contestation for scarce resources, others attribute it to the country’s violent past, inadequate service delivery and the influence of micro politics in townships, involvement and complicity of local authority members in contractor conflicts for economic and political reasons, failure of early warning and prevention mechanisms regarding community-based violence; and also local residents claims that foreigners took jobs opportunities away from local South Africans and they accept lower wages, foreigners do not participate in the struggle for better wages and working conditions (Mogekwu, 2005; Schwartz, 2009; Zouandé, 2011). Other local South Africans claim that foreigners are criminals, and they should not have access to services and police protection. Foreigners are also blamed for their businesses that take away customers from local residents and the spread of diseases such as HIV/AIDS. Other South African locals do not particularly like the presence of refugees, asylum-seekers or foreigners in their communities. Foreigners are used as the convenient scapegoats and mask for individual and government failures (Mogekwu, 2005). As long as the South African government and those involved in the attacks do not take responsibility for their failures, this unfortunate situation is likely to be prolonged.

*Access to Economic Opportunities*

In South Africa immigrants are seen to threaten the jobs of locals as well as undermining wages in an economy that has high levels of unemployment, poverty, and income inequality (Mogekwu, 2005). The South African citizen's micro-enterprise faces sales, and therefore income, fluctuation more than a person employed in a regular job. In some months sales are very high; in others, they drop radically (McDonald and Jacob, 2005). The owner must balance cash inflows with the outflows so that there is always enough money to meet expenses. Sometimes this requires the owner to take a short-term loan to help the business get through a tough period. Almost every microenterprise has sales fluctuations. On the other hand, foreign national’s micro-enterprises are not affected as they sell cheap materials or products, thus, they can reduce the prices so that customers or buyers can come to them, and that leads to micro-enterprises of South African citizens drowning down.
Societal and Cultural Beliefs
When the xenophobic violence in South Africa occurred, the victims were not only foreigners in the sense of a different nationality are attacked but in fact everybody not belonging to the dominant ethnic groups in the main cities, Zulu or Xhosa was attacked. Members of smaller ethnic groups in South Africa are also viewed as foreigners by fellow South Africans (Mogekwu, 2005; Gumede, 2015). White people are not viewed as foreigners in the context of xenophobic violence. There had been attacks on South Africans who 'looked foreign' because they were 'too dark' to be South Africans (Mogekwu, 2005). Societies continues to perpetuate xenophobia by not accepting their children to get married to foreign nationals whom they refer to as makwerekwere, this is usually experienced by girls where they are impregnated by foreign national, then when girl want to marry the foreign man her parents would not allow the marriage to take place because of their stereotype perceptions of foreign nationals from their elders.

Failure to Maintain the Rule of Law
The government is completely responsible for xenophobia in South Africa (Danso and Macdonald, 2000; McDonald and Jacob, 2005). However, due to its repeated failures to bring levels of violent crime under control, which contributed to an environment which saw people resort to violence without fear of arrest or successful prosecution, the incidences of xenophobia persisted. In failing to maintain the rule of law, the government conditioned many poor communities to violent behavior (Akindès, 2009). The failure to protect communities from criminal elements and to remove those elements allowed criminals to take full advantage of chaos and disorder to rob rape and loot during the violent uprisings.

Potential Damage of the Country's Image Globally Due Xenophobic Attacks
The manifestation of xenophobia undermines social cohesion, peaceful co-existence, and good governance, and constitutes a violation of human rights (Akindès, 2009). Furthermore, as South Africa is part of international human rights and humanitarian treaties, especially on expatriates and refuge seekers, obligations to combat xenophobia have both a legal and a moral force. As a liberal democratic country fostering the New Partnership for Africa’s Development (NEPAD), the Southern African Development Community (SADC) and the Africa Union (AU), South Africa is barely in an ethical or an economic position to close its borders (McDonald, 2005; Kalitanyi and Visser, 2010). Therefore, the moral implications of allowing xenophobia to continue unabated should be an additional worry for the government to its international image.

The South African expression of intolerance towards their fellow Africans has attracted analysis from all over the globe due to its somewhat hypocritical nature (Kalitanyi and Visser, 2010). Migration is a sign of South Africa’s emergence as Africa’s preeminent economic, educational and cultural centre; and from an international perspective it is seen as something of a duty to share this prosperity with its African counterparts (Kalitanyi and Visser, 2010; Zouandé, 2011; Hussein and Hitomi, 2013; Gumede, 2015).
To allow citizens of one member state to think and act in xenophobic ways about citizens of another, is ultimately extremely destructive of regional cooperation and harmony.

President Jacob Zuma said “South African blacks should not behave as if they were typical blacks from Africa. The African National Congress Secretary-General, Gwede Mantashe, blamed foreigners for stoking unrest in South Africa’s platinum belt. Small business development minister Lindiwe Zulu, said the businesses of foreign Africans based in township could not expect to coexist peacefully with local business owners unless they shared their trade secret”. King Goodwill Zwelithini said “African migrants should take their things and go”. Whether intentional or not, such rhetoric and narratives constructed by South African elites and government officials can be a powerful polarizing and inflammatory force to incite xenophobia from below. This raises questions regarding leadership at the local and national level in South Africa, and its role whether conscious or not in inciting violence against black Africans. Particularly, government reluctance to strongly condemn the role of King Zwelithini in inciting the violence also leaves much to desire about South African leaders’ response to the crisis.

The routine persecution and exploitation of foreigners facilitated by their inability to summon the protection of the state has legitimized their status as deserving targets of outrage and expropriation (Hitomi, 2013; Gumede, 2015). However, the rest of the world, especially Africa, is watching as South Africans mistreat their fellow Africans in a country that preaches ‘ubuntu’ and togetherness (Akindès, 2009; Hitomi, 2013; Gumede, 2015). The need for transformation cannot be overstated. There is a need for collective reflection to come up with a sustainable solution to xenophobia. Responsible leadership is crucial. South Africa and other African countries need to think about immigration and relations of social interconnectedness on the continent, especially at a time when immigration is becoming a major security debate both continentally and internationally.

**Conclusion and Recommendations**

The purpose of this paper was to discuss the discriminatory acts of the South African citizens towards foreign nationals. The paper examined the historical origin of xenophobia in South Africa and found that most important reasons behind the prevalence of xenophobia in South Africa are economic opportunities and the tendency to criminalize foreigners. Existing explanations in terms of economic crises, political transition, relative deprivation, or remnants of apartheid all contain an element of truth but are not in themselves sufficient. Proclamations from politicians coupled with media reporting on drug syndicates, prostitution and human trafficking, all feed and in turn feed off a popular perception that migrants are bad for South African society and its economy. The paper also found that it is all too easy for the media and the government to place blame on immigrants for crime, unemployment and housing problems, however, it is not a lasting solution can only be detrimental for the economy, culture, society and international image of South Africa.
In order to curb xenophobia the following measures are recommended: first and foremost, it must be made clear that the primary challenge that the government faces is an educational one, as it is unable to focus on any one group in society. The government has to take duty of providing citizens with vicarious knowledge of migrants, immigrants and refugees as people through the media. This would also be helpful to encourage a greater sense of continentalism and internationalism through the media and through the public pronouncements of opinion-makers. This can be achieved by working with schools, colleges and universities to include issues such as citizenship and xenophobia in their curricula, and to stress the positive impact that immigration can have on South Africa’s economy and society.

The government has to go beyond detecting, detaining and deporting migrants in order to tackle crime, disease and joblessness. These issues need to be treated completely separately from that of migration. One important aspect of xenophobia is the virtual absence of any sense of solidarity with other countries in the SADC; the government must work with other SADC countries in order to improve, or even create, a real sense of regional consciousness amongst citizens and policy makers. The starting point could be for individual state and regional organisations to devise and implement public education programmes that emphasize tolerance and common interests.

References


Xenophobic Attitudes against Immigrants and Cheap Political Talks: Sitting Time Bombs and Explosives in South Africa

Mokoko Piet Sebola

Abstract: It is clearly known from the governments’ perspective that foreign policies are an activity of the state. To that extent the government is said to be representative of its citizen in international relations. Citizens are, therefore, to have a limited say on how their government decide to interact with whichever country and at whatever terms and applicable conditions of agreement in that relationship. That right accorded to government by its people gives the government an authority to enter into international relation on agreements which if people were given platform to talk they would have not agreed to such relations. This paper would like to argue that the interactions on foreign relations without citizens’ inputs and knowledge are major causes of a discomforted relationship between locals and immigrants of foreign descendants. This paper is conceptual in nature and will use literature sources to argue that if government as an authority of foreign policy enters into foreign relations agreement and does not inform its own citizens accordingly a hostile relationship between the locals and immigrants is likely to continue unresolved. This paper conclude that in South Africa a clear political education and on African continent a sound government stand on immigration is required to put people on same level about immigrants’ rights.

Keywords: Xenophobia, Immigration, international relations, South Africa

Introduction

Even after two decades of democracy, South Africa continues to be called a new democracy facing different problems. The tastes of democratic problems in South Africa started with a painful stage of trying to mend a more than four hundred years of broken trust among various racial groups that stayed separated with different benefits for years in the country. That was followed by redemarcation of geographical boundaries that were ethnically and racially segregated. The problems were many and

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some included a high rate of unemployment, crime, poverty and inequality as well as restructuring the whole education system of the whole country from basic to tertiary levels. Above it all one may agree with Hendrickse (2009:1) that South Africa is a country in political transition and should be perceived, seen and understood as such in this era of transition. While the country claim to have done enough to date on other issues- the problem of political and economic instability of the neighbouring countries needed attention which they shelved and ignored. Hence the outbreak of the so called xenophobic attacks twice in one decade. The country did not take a serious note of this event when it happened previously in 2008 and 1990 respectively. The matter was addressed through cheap talks that South African should just learn to leave with others. Such cheap talks did not address the major concern of the cause for the event in the first place. When violent attacks erupted in 2008 and the government established an Inter-Ministerial Committee headed by the Minister of Police (Dunderdale, 2013:3) which ceased to exist actively after that period. The incident happened again in 2015 the government and responsible stakeholders continue with cheap talks that South Africans should learn to leave with others. The cheap talks without looking at the underlying cause are likely to cause an event to recur in future. This paper argues that ignoring the real causes of conflict between the locals and immigrants is likely to recur if such causes are not identified and dealt with. A major research question in this paper is: What are the real causes of rift between the locals and the immigrants in South Africa to the extent of causing losses of life? In addressing this research question the paper will focus on: Conceptualising xenophobia, Xenophobia and immigration in international context, handling migration in South Africa, Attitudes of South African against the immigrants, the biasness and truth of the South African xenophobic attitudes and the possible bombs and explosives in South Africa.

Defining Xenophobia in South Africa

Xenophobia is a concept that is often put closer to racism, however, Bennet (2013) views it as a manifestation of what he calls ethnocentrism which refers to one’s view of his group as a centre of everything and John (2002) adds that it involves negative attitudes towards other ethnicities or races. Xenophobia as a concept of course differs from racism in the sense that it denotes behaviour that is specifically based on the perception that the other person is foreign to or originates from outside the community or nation (McKingley, Robinson and Somavia, 2001: 1-2; Adjaiand Lazaridis, 2014). Indeed xenophobia as a concept may have within its elements racism because colour and race would in most probability play a role in influencing xenophobic attitudes against individuals. Colour and the extent of pigmentation have been used in many instances to determine the supposed origin of individuals. In South Africa police have used expressions like one is too dark to be a South African. Often people were wrongfully arrested by authorities because they were seen to be too dark to be South African citizens.

Laher (2009: 1) and Meda (2014) define xenophobia as hatred and prejudice against outsiders or foreigners. This hatred is believed to be based on fear of the unknown. It is argued by Parliament of
South Africa (2008:5) that xenophobia is largely based on unfounded or unverified fears, and the inclination to stereotype foreigners as the cause of social and economic problems in host countries. In South Africa the concept application has been difficult to attest to because that which the media calls xenophobic attacks in South Africa only affected a specific group of people. Yet others argue that the South African attacks on specific foreign nationals cannot fit the definition of xenophobia because the victims of such attacks were Africans than other racial immigrants' groupings in the country. While people have painted South Africa as one the most xenophobic country in the globe, Sebola (2008) and Laher (2009) demonstrated that only immigrants of foreign descendants are affected by xenophobic attitudes and attacks in comparison to immigrants of other racial groups such as Europeans and Asians in the country. In South Africa most academics and prominent politicians have argued that the context is misplaced and we should rather talk of Afro phobia or Negrophobia than xenophobia. While Shadrack Guto and others argue for Afrophobia as such, other counter arguments have emerged that the Bangladeshis and the Pakistanis were attacked in the same fashion in South African townships. Thus, disputing the Afrophobia assertion.

**Xenophobia and Immigration in International Contexts**

Xenophobia or rather its attitudes as espoused today in the media about South Africa is not a South African peculiar problem (Dunderdale, 2013:1) and is indeed a global scourge (Quinlan, 2013:1-2). Since the occurrence of this unfortunate incident in South Africa both the international and national media have been hitting hard on the image of South Africa as a xenophobic country. But in reality it is generally known that xenophobia is a global phenomenon and have not ceased to exist even in the most well-known democratic countries. It is just that in most countries it might not have reached the violent level and scale that South Africa had reached. Human Sciences Research Council (n.d:4) argues that South Africa is not the first in the world to be a host to xenophobic jealousies, prejudices and violence. Neither was the 2008 xenophobic violence the first in the country. The 1990 xenophobic violence in Cape Town which left twenty Somali’s dead did not get much public coverage as future violence of the same cause.

Xenophobia cannot be justified as the globe is free for everyone to travel in through signed international conventions. But the problem is that those international conventions recognises the sovereignty of countries in managing immigrants in own land. While countries manages immigrants in own countries through international relations protocol which are in the hands of the Executives, the people at the grassroots level knows little of those bilateral government relations. The foreign relation agreements between countries do not necessarily mean a bilateral relation agreement with the people of host countries at the grassroots level. And yet those bilateral relations agreements between countries do not affect the executives as such- but instead affect the people at grassroots level who had little or no knowledge of how countries agreed to assist each other on particular issues. Those in authority also know that it is indeed the characteristics of an immigrant that determines his acceptance or rejection in
the host society (Francois and Magni-Berton, 2013). Xenophobia as argued in most literature is an undeniable social reality which must be understood on bases of sound information and objective perspectives of its source (Centre for Development and Enterprise, 2006:2). On the other hand it is believed that foreign nationals staying in South Africa experience xenophobia in different ways (Meda, 2014). In this paper I argue that xenophobia is a global issue and it must be understood as a global problem that has to be addressed carefully beforehand because of its explosive potential in the face of government; in this instance I will look into cases of xenophobia in developed countries and Africa before focusing on South Africa.

Xenophobia and Europe
The European Union claims to be a leading example in democracy, but that does not immune it from being the most prominent immigrants receiving region in the world (Jolly and Digusto, 2013), but the European citizens even politicians have demonstrated their concern about viewing immigrants as a potential threat than an opportunity to their economic growth. Although countries within the European Union such as Germany, Netherlands and Italy have policies for assimilating nationals of foreign descendants into their communities, but studies suggested that those countries have negative sentiments against immigrants in their countries. Italy according to Oudenhouven, Ward and Masgoret (2006) is described as hostile and xenophobic against immigrants. Germany has a history of anti-Semitism which is a specific hatred towards the Jews and that cannot specifically be termed xenophobic. But studies still reveals that a considerable proportion of Germans are more resentful towards the immigrants and Jews (Solomon and Kosaka, n.d; Shindondola, 2008:15-18; Krumpal, 2012) and demonstrating similar complaints such as crime, threat to culture, committing social fraud and taking jobs that belongs to the Germans. Ironically, the German issues are almost similar to South African’s concern about immigrants in their country (Sebola, 2011) as reflected in many xenophobic studies conducted in the country. In France political parties built their support base on xenophobic stand in which the foreign nationals are seen a major cause of high unemployment rates, crime and social woes (Jolly and Digusto, 2013). Even the French President Nicholas Sarkozy argued that France has too many foreign immigrants who are not capable to integrate into the society. The President’s call may not be an attitude but a fact in his circumstances. The fact is that such calls by heads of states risk the security of the foreign nationals in the host country. While countries around Europe such as Finland and Switzerland the scale of xenophobia is low, but the same cannot be said about neighbours such as Russia, however, the Russian government under Puttin deals with that by enacting legislation to ban organizations that are seen to perpetuate xenophobia, racism and fascism (Solomon and Kosaka, n.d:19).

Xenophobia and the Americans
The United States of America and Canada are rated the most xenophobic countries by China, Cuba and North- Korea (Rayne, 2015:1). These accusations from the so called authoritarian nations are despite the fact that the United States of America receives a large number of immigrants from such countries and for
various reasons. Although the United States of America is well known as a nation of immigrants, it similarly has the highest incidences of xenophobia and intolerance of immigrants (Yashuko, 2009). Statistics shows that United States of America is composed of people of European origin (68%), Hispanic (14%), African American (13%), Asian American (4%) and Native American (1%). Although America has a history of xenophobia, it is believed to be good at adopting an assimilationist’s philosophy on immigrants (Oudenhouven, Ward and Masgoret, 2006). Thus far America has been very good in the process of brain drain from African countries. As such America may not necessarily have typical immigrants like the ones that South Africa attracts. It should be noted that most of the immigrants that South Africa attracts are at the lower level of formal education and cannot contribute to skills shortage in the country other than being labelled as an addition to the existing high level of unemployment.

**Handling Migration and Xenophobia in South Africa**

South Africa is a signatory of many international conventions on international migration. Matlou (2001:121) and Sebola (2011) assert that South Africa’s immigration policies are the most user friendly in the continent in the sense that a foreign national is allowed to work and study while the application for asylum are still under consideration. The view however does not currently hold the practice in the currently reviewed immigration law of the country. South Africa’s immigration policies have been argued to a particular extent as being abused by nationals of foreign descendants in application. The country is one of the 15 in the globe that contributes some of its financial budget to the United Nations High Commissioner for Refugees (UNHCR). Despite such numerous attempts by the country to improve its image on its neighbours, especially from the dragonian apartheid immigration policies, the country was struck twice by xenophobic incidents which risked its image further on the globe and the neighbours.

South Africa’s immigration act is highly considered as being friendly to immigrants, however, according to McConnell (2008:37) the act is “extremely limited and ambiguous” in two ways; firstly it focuses on attracting highly skilled immigrants and ignored the poor immigrants. Secondly; it commits itself to uprooting xenophobia without spelling out the strategy for doing that and instead tougher enforcement through community policing on undocumented immigrants seem to have increased the level of xenophobia than uprooting it. Gordon (2010) also noted the contradiction of the Act and refer to its intention of dealing with immigrants as a “double speak” than contradiction. Lubbe (2008) sees the new immigration Act 32 of 2002 as a source of problem because it encourages citizens and organisations to report any immigrants suspected of breaking the law. However, the provisions have been questioned before in the act as having the potential to influence xenophobic attitudes. The Chairman of the Parliament Portfolio Committee of Home Affairs defended the act as harmless and with good intentions (Lubbe, 2008). It should be understood that South Africa also has its operations to eliminate crime. And crime is an act that is against the law. Most of the critics on this act in literature have argued it on basis of
the coinage of the police operation such as “Operation Crackdown” which mostly target criminals at certain areas which are unfortunately dominated by immigrants who are mostly illegal. But indeed if to be illegal in a country is a crime; then there is no way such individuals in that area would not be arrested and deported. Lubbe (2008:4) argues that with the provisions of section 22 of the South African Refugee Act of 1998, the foreigners are likely to commit acts of crime simply because the host country is not taking proper care of them. In this instance there has always been counter arguments from both the locals and the immigrants claiming to be victims of crime. Researchers and academics in this instance have also recorded information as it is without digesting it intellectually.

South Africa is, however, one of those countries that believe that immigrants should be integrated into the local communities on arrival and not to be kept in refugee camps. Many Human Rights Commissions are concerned about Section 22 of the South African Refugee Act of 1998 about the Asylum Seeker Permit. The Act removes the right and study asylum for 180 days while the claim is still processed (Handmaker and Parsley, n.d). However, the South African policies are in line with its constitution which is regarded as the best in the world, its immigration policies are not hailed as such by the outsiders and Human Rights groups. It suffices to say that no immigration policies are made in the best interest of foreign nationals in any country. All immigration policies while considering hospitality for nationals of foreign descendants, they are also considered in the best interests of protecting the country concerned.

As a country South Africa is one the most immigrant receiving country in the region and mostly because of its fair economic and political stability in the region (Sebola, 2011; Adjaian and Lazaridis, 2013) and inconsiderable number of immigrants is likely to increase above the level of local acceptance. This immigrant receiving incident is likely to continue in future as long as the neighbouring countries are not improving politically and economically to keep their locals happy. South Africa, therefore, should get used to the reality that xenophobia needs attention because immigrants would not be reduced and will instead increase in the country. In the two violent incidences that took place in the country, South Africa seems to have done little to mitigate the causes and ensuring that such are avoided in future. Currently South Africa is host to a large number of immigrants from Congo, Mozambique, Zimbabwe, Rwanda (Hendrickse, 2009:3-4) as compared to immigrants from other countries. There is also a further substantial number of immigrants from Ethiopia and Somalia and Nigeria whose statistics in the country might not yet be known. Immigrants of other racial group are not a priority in this discussion since they are rarely affected by the xenophobia discourse of South Africa.

Dunderdale (2013) argues that there has been very little action from the government since the first xenophobia strike in South Africa. All that the government did in the circumstances was to create a public broadcast based on similar cheap talks like “learn to leave together”. There is little that the government put to the public in terms of causes that have been identified and steps taken to address issues that caused the xenophobic attacks in the first place. It can be argued that the solution to the xenophobic
attitudes can not only be solved through public awareness of blame on locals and police enforcement agencies as if they were not there in the first and the second xenophobic strikes on innocent immigrants.

**Perceived South African Attitudes on Immigrants**

Globally the attitude of South Africans against immigrants is rated as being very negative. Most literature have captured the attitudes of the South Africans as the worst in the globe against fellow African refugees (Naicker and Nair, 2000; Human Research Council, 2008:17-18; Chamananda Piper, 2012; Hussein and Kosaka, 2013) and others add to say that xenophobia has become a feature of a South African citizen (Crush and Ramachandran, 2014:1). These attitudes are perceived to be commonly practised by citizens, government officials, the police and private organisations that are contracted to manage the detention and deportation of illegal immigrants (Landau, Ramjathan-Keogh and Singh, n.d:4; Lubbe, 2008:5). In this perceived attitudes there is one point that is often missed; the question of focus of attitudes is known from one side only. While literature in South Africa’s xenophobia focuses on the negative attitudes showed by the South African citizens, police and other related organisations on illegal immigrants, little is focussed on causes of such attitudes against immigrants. Therefore, the perceived attitude of the South Africans on immigrants is viewed from the perspective of the victims rather than the other actor. Little is said about the feeling of the South Africans about immigrants who live with them. Most studies mainly focus on perception of immigrants on South Africans and regard those perceptions as facts about who South Africans are.

Hussein and Kosaka (2013) in analysing the study conducted by South African Migration Project (SAMP) in 2001 concluded that South Africans indeed promote xenophobic discourse since they are of the opinion that the number of immigrants in the country need to be restricted. This opinion according to Chamananda Piper (2012) might not necessarily mean being xenophobic but may rather describe South Africans as being “defensive and protectionists”. This is also in line with some findings that comparatively speaking South Africans are the most open citizens and welcoming to foreigners than in other countries. Considering the transitional period and the low socio-economic conditions the South Africans currently find themselves in, the high rate of crime and the rising costs of living such attitudes could come from any nation in the globe if the government handles their concerns with silence diplomacy. Human Sciences Research Council (2008:18) and Maharaj (2009:14) have noted that both the police and politicians have demonstrated their negative concern about how immigrants are involved in most of the crimes committed in the host country. It is, however, also notable that such contention was never supported by any proof of statistical evidence. Thus far the causes of negative attitudes towards immigrants by the South Africans are not clear and have been based on perceptive studies with no clear statistical evidence and correlated hypothesis testing. Even some convincing studies that were done to determine the cause and effects of xenophobia in South Africa have never seen practical application. For example a vast of academic studies and those conducted by many migration organisations in the country have looked at how a fight
for scarce resources (such as access to employment and health facilities and small business practices) between the locals and the immigrants has topped the list as a cause and effect of troubles in the xenophobic discourse. The government’s reaction has always been that they must compete together rather than coming up with a solution to end the competition for scarce resources. Nkealah (2011) and Sebola (2008) argue that the battle for the scarce resources will continue to play a role as a major cause of xenophobic attitudes between the South Africans and immigrants. It can be argued that this major cause of xenophobic attitudes by the locals cannot be solved by cheap talks of mere staying together, there is a need for an action to improve the status quo which has been followed by other countries in the globe that experienced this kind of disaster before it. Literature has demonstrated that there are still more cases of xenophobic attitudes in developed countries such as France, Russia, Germany, Britain and other areas of the globe (Oudenhouwen, Ward and Masgroet, 2006; Shidondola, 2008:15-18; Krumpal, 2012; Jolly and Digusto, 2013). It is highly recognised that xenophobic attitudes are a serious global problem and often because of lack of research conducted in other regions it becomes difficult to compare the exact similarities and differences both regionally and continentally. International human rights organisations and similar countries have played a game of blaming countries affected by xenophobia than providing alternative and workable solutions to assist the cause.

The Biassness and Perceived Truth of the South African Xenophobia

A vast amount of literature in South Africa exists that suggests the causal factors and the extent of xenophobia in South Africa. Some have clearly argued that there are no known clear exact causes of xenophobia in South Africa. A vast amount of writings has little focus on the causal factors of this problem. Studies were indeed concerned about the perceived attitudes of the South Africans on foreign nationals and the perception of immigrants about the South Africans. That has ultimately put the discourse of xenophobia in South Africa at a relative scale of perception. All that researchers have compiled about this discourse is information that cannot be excluded from being bias and with little elements of the truth and genuine causal factors. The South African xenophobic story is a story of my word against yours; and that does not bring the solution on the table for the problem concerned. There are basically three or four areas of concern about the reliability of the xenophobia discourse in South Africa; namely who tells the story of this discourse, the South African government stand, ‘we and them story’ and effectiveness of human rights organisations and non-governmental organisations handling immigrations matters.

Who tells the discourse of the South African xenophobia?

Having perused from a variety of literature that tells the story of xenophobia in South Africa, it is highly improbable to accept its authenticity without suspecting any elements of biasness. My point is that it is not like the discourses are not academically researched or written. It is true that since the first xenophobic attacks as early as after the 1994 elections, this problem has provoked an opportunity for research in the
country. The Human Sciences Research Council has produced little volumes on this matter in 2008. Universities overseas and in South Africa registered xenophobic titles at the level of masters’ degrees. Of the few dissertations on the topic that I fully perused are by Nahla Valji, (2003, York University), A.K Tshidondolo (2008, University of Johannesburg), Tapiwa Gomo (2010, Malmo University, Sweden) Mariam Di Paola (2012, University of Witwatersrand) and Live Hagensen (2014, Stellenbosch University). I am not ruling out the probability of other studies being done on similar topic by South Africans. But the majority of registered master’s degree in this discourse seems to have been told from the perspective of international researchers who I can presume may lack genuine causal factors and objective interpretation. Alexandra Davis, an NGO employee and a University of Cape Town Master of Philosophy degree registered in the same xenophobic title in South Africa clearly spelt out in her limitation of study that being ‘a white female and a foreigner’ that might affect the data she would obtain.

Very few studies seem to have been conducted in South Africa by the national citizens moreover they are also typical sympathetic studies mainly based on opinion of international students than South Africans. And the reason why most South African immigrants may not need to indulge in this discourse is not clearly known. But is probably a matter of concern. A vast number of scientific articles published in international and national journals exist on South African xenophobia, but little of those articles have been penned by South Africans themselves to tell their story on the discourse. Hussein Solomon and Jonathan Crush are the only ones that dominate the discourse of migration in South Africa. It can therefore be argued that the lens by which the xenophobia discourse is analysed and understood is through the lens of a victim and the alleged victimiser says a little or nothing about the matter. While no solid evidence exists that the information on xenophobic research in South Africa is biased no truthful evidence exists to suggest that the lens through which we are made to see it is accurate. International NGO’s that often play a crucial role on humanitarian issues might not be as objective as they are supposed to be in adjudicating for African causes. Most of them come from developed countries with little economic problems and might fail to understand the real African problems as they ravel themselves. Blame on attitudes of South African than trying to find a cause for an attitude and its solution will do little to assist the problem to be addressed.

The South African government’s stand on xenophobia

The South African government’s stand on xenophobia and the immigrants is double-talk as argued in most literature on the subject. While the government is saying all that we all know such as condemnation of the acts of violence and promotion of the living together with immigrants; the talk is left while the walking is right. The government seems to know the causes of such as competition for scarce resources, police abuse of immigrant’s conditions and the lack of capacity at boarder posts control and Home Affairs. These have been attested to by many scientific studies conducted by Sebola (2008); Sebola (2011); De Vos (2008:1-2); Dupunchel (2009); and Human Sciences Research Council (2008:1-57). The government
has done little, if any, to deal with issues identified as major contributors. This could be attributed to the governments'denialism of the xenophobic existence (Crush and Ramachandran, 2014:8-9). It is clearly argued that while human rights organisations and other concerned organisations have raised their concern about the double-talk immigration legislation which seem to promote rather than alleviating xenophobia the government remains adamant on retaining the act as it is without the probability of alteration. It may seem that the truth lies in the fact that only skilful immigrants are assured protection and equality for the country’s benefit. The xenophobic discourse talked off in the country is considered no less than mere criminal activities by selected South African citizens in the country and cannot be generalised as a South African social problem. The South African governments' inactive stand on the issue is also influenced by other political realities on the ground. Landau, Ramjathan-Keogh and Singh (n.d) noted that the whites in South Africa hold a positive view and sympathise with immigrants in which South African black nation are seen as evil against their own brothers and sisters. On other side the Unions are in favour of removal of immigrants who are taking jobs from their local membership (Maharaj, 2009). And yet employers who are predominantly whites sympathise with immigrants not because of being capable of that emotion, but simply because they benefit from maximising profit by labour exploitation of the immigrants. Immigrants do not have unions and are not in a good position to negotiate their terms of employment. Other than that the integration of South Africans with immigrants practically excludes the integration with the whites. Whites in South Africa are accommodated in suburbs where they are not even capable of being in peace with middle class income Africans. On their farms they keep African employees at inhabitable farm houses distanced from their own. Therefore, literature cannot take an objective stand on what the white community is thinking on South African xenophobic discourse.

**The payback time theory**

A theory does exist which is held by many immigrants and many South Africans that South Africa owes its existence to its neighbouring countries (Lubbe, 2008; Sebola, 2008; Sebola, 2011; Naicker, 2000). From this theory it is argued that when South Africa wanted to fight for its own justified course of being against apartheid our liberation heroes went to stay in Lesotho, Zimbabwe, Botswana, Mozambique, Zambia, Tanzania and Nigeria at the least. For that matter those countries have welcomed South African struggle heroes with open hands to an extent that their civilians have often died from the attacks that was launched by the apartheid government in those countries. Today South Africa finds itself in the same position that it has to give the favour back for immigrants from the continent that suffered the same fate as them before. And yet indeed now South Africa has many immigrants with the largest number of them coming from Zimbabwe and Mozambique (Sebola, 2008). Immigration is immigration and is not about Zimbabwe and Mozambique. The problem with regard to xenophobia and the payback time theory is very much complicated and scientific research may ignore even the most useful information in order to be politically correct with facts. Firstly the discourse of xenophobia ignores the pattern of the attacks which are coined as xenophobic that in it no Nigerian, Tanzanian, Motswana, Zambian or Mosotho or Mswati or
foreign Indian is victim of these xenophobic attacks. And yet South Africa hosts quite a diversity of immigrants from different parts of the globe and is the most common immigrant receiving country in the region of Africa. Secondly, although the number of victims suffered differs, as reflected in academic sources and newspapers, only our most important brothers from Zimbabwe and Mozambique are listed the most as victims and with no mention of a cause of the event as such. They are followed by the Somali who are little known as the beneficiary of “payback time theory”, but with them is clearly spelled out that their shops are vandalised and looted. This only suggests one or two things that these activities might have been influenced by nothing other than crime than hate. The payback theory in South Africa is likely to be in trouble because the current people that are involved in these activities were either a month, a year old or were not even born when South Africa got independence or assistance from neighbours. Neither are the current victimised immigrants reliable authorities of what happened while the South Africans were in exile. Most of those exiled South Africans that benefitted from the foreign courtesy have either passed on or are in elite positions now and have forgotten that courtesy, hence we have a problem.

“We and them story”

The conflict between the South African nationals and fellow African immigrants is solely based on opinions of biased third parties. Very few of these third parties are basing their opinions on facts than blames and sympathies which fuel the conflict than resolving it. Centre for Development Enterprise (2006:2) argues that people should not ignore the circumstances under which the South African attitudes against immigrants result in hostile acts. South Africa has a tremendous history of accommodating immigrants (Lubbe, 2008:1-3). It has a long history of housing people from Africa and there were never acts of violence against each other before. These acts of violence against immigrants are recent and it emanates from the post-apartheid political settlements. When this violence against each other takes place the immigrants put blind eye on the cause and blame the locals for being unwelcoming and selfish. While on other hand the locals blame their government of making their country’s scarce resources a free commodity for everyone on board. The immigrants are telling their own story; while the locals are telling their own and therefore little development take place in the discourse. The South African media on other hand have been telling its commercial story from its own perspective. It is very clear that speakers of the xenophobia in South Africa are pulling the truth to their side, but what remains is that welcoming each other as an ordinary peaceful talk than looking at what are the exact causes of conflict cannot be an effective solution to the problem.

The effectiveness of human rights organisations and Non-governmental organisations

The role of human rights organisations and non-governmental organisations on conflict resolutions in developing countries is undoubtfully biased. When it comes to human rights issues both Human rights organisations and responsible NGO’s have played a political opposition role than a complementary role to the government mission. This is often clear because most Human rights organisations and NGO’s in
developing countries are funded from foreign countries with foreign missions in developing countries. The so-called human rights organisations and NGO's are likely to play a biased political role that fuel conflict in developing countries than humanitarian role that would bring about solution to the cause of the conflict. Human rights organisations and NGO’s have to continue with the blame on behaviours of South African citizens than suggesting workable solutions for all.

**Sitting Time bombs and Explosives?**

The intention to solve the xenophobic problems of South Africans against their African counterparts is clear (Parliament of the Republic of South Africa, 2015; Wilkinson, 2015:1; Cronin, 2015:1-2). The South African government accepted and apologised to the global community about the ugly manner in which their citizens inappropriately handled themselves on the global stage. But that was nothing better than talks that have been only talks. But no real issues were addressed except blames on the attitudes of South Africans and the expectation that they have to change their attitudes against their neighbours. And yet other arguments are that South Africans hardly know the African continent well (Institute for Justice and Reconciliation, 2015:2). Little was done to mitigate the potential future xenophobic threats. The threats at lower level community started as early as 1994 that there were business and employment threats by people at grassroots level that compete with South Africans for those lower level opportunities. Competition for scarce resources always has the potential for conflict between indigenous and foreign immigrants or insiders and outsiders (Maharaj, 2009; Nkealah 2011; Banda and Mawadza, 2014). The local South African indicators for potential threat were not taken into consideration until it reached its peak in 2014. The potential xenophobic threats still exist in universities and such potential threat is not only for South Africa but can spread to other affected countries such as Botswana and Namibia which are affected by a high rate of immigrants from politically and economically unstable countries in Africa. The solution to this threat cannot be solved through blame of locals who do not accept people outside of their community but by looking at the root cause and mitigate on its threat. The academia of South Africa and other professional categories are not yet in the open about xenophobic challenges in employment, but there have been hazards all over the employment of people of foreign descendants in units where locals’ skills are not necessarily in shortage. It is important to address the real cause before the professional categories follow suit.

On the other hand individuals of foreign descendants complain that they cannot be treated unfairly no matter where they are on the globe. They cannot afford to be searched by local police as they please simply because they don’t look local whether legal or not legal in a host country. They want to enjoy the privilege of humanity like any other local citizen whether legal or not legal. This threat is very serious and can expose South African law enforcement officers into the trouble of police killing. Gordon (2010) argues that due to its potential future economic growth, immigrants would continue flocking into the country regardless of legal restrictions. South Africa is a favourable destination for immigrants and not only
because of its growing economy, but mostly because of its human rights protection enshrined in its constitution (Adjai and Lazaridis, 2013).

Most studies already have demonstrated that individuals of foreign descendants in South Africa have cried foul play of being made to pay bribes by both officials of Safety and Security as well as of the Department of Home Affairs and that when they are not capable of paying bribes they end up in deportation trucks or jails (Human Science Research Council, 2008:11). The Police are expected to protect the vulnerable immigrants other than contributing in persecuting and arresting them unlawfully (Institute for Justice and Reconciliation, 2015:3). Considering that the country’s crime rate is high, in which criminals are involved in police killing, it would be worse if immigrants can take advantage of such cases and join criminals in police killing.

Ignoring political education and geo-political knowledge by the South Africans have potential for explosive xenophobic environment in future. South Africa has entered into various bi-lateral and multilateral relations of which its own people have no idea. Hence there are different reactions between the government and the local people on immigration issues. Although by virtue of its existence, the government represents the state in international relations, there exists a need for political education on the problems and significance of immigrants in host countries.

Conclusion

This paper has argued that immigration matters are often an issue of the government and foreign countries with little role from the local people. The bi-lateral relations that countries enter into are often not in favour of the local people and hence the agreements made between countries are often tempered with by the reactions of the local people. South Africa recently appeared to be the most xenophobic country in the globe when local citizens are said to have attacked people of foreign descendants in their country. But most literature on the subject argues that such actions are not peculiar to South Africans and have been common even in the most developed countries in Europe. Although other countries are not practicing it in the manner that South Africans reacted, European countries have enacted legislation to ensure that foreign nationals are protected and promised harsh steps against local that will persecute or promote xenophobic tendencies.

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Television News Coverage and Xenophobic Attacks on Foreign Africans in South Africa: A Content Analysis of Youtube Videos

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Abstract: The issue of xenophobic attacks on foreign Africans in South Africa has generated debate and discussion among media experts, scholars and policy analysts across the globe. The danger and socio-cultural implications of this issue have triggered an increase of reports and commentaries on national and international news television outlets in the international community. This study examines television news coverage of xenophobic attacks in South Africa, using Youtube videos as examples. The method adopted was content analysis and 9 news videos of 3 selected television stations were analyzed; British Broadcasting Corporation (BBC), South African Broadcasting Corporation (SABC) and ENCA. Also, four research questions were raised and adequately answered in this study. From the findings of the study, four predominant themes were identified and discussed as it affects current realities. It was recommended that sufficient attention should be given to matters of xenophobic attacks on foreign Africans by the South African press. Furthermore, the television news media should adequately utilize its developmental theory/function for the positive change and development in South Africa.

Keywords: television, news, xenophobic attacks, foreign Africans and Youtube

Introduction

Across the globe, the xenophobic attacks on foreign Africans in South Africa have become a perennial issue. The recent xenophobic attack on foreign Africans in South Africa, which began from early March to late May 2015, has raised debate and discussion among scholars, media experts, policy makers, government officials and international observers. According to media reports, the recent xenophobic

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attacks were triggered by controversial statements of the King of the Zulus, who has unbridled influence over 1.4 million Zulus in South Africa (Sowetan, 2015).

In retrospect, there was another drastic xenophobic attack in May 2008 on foreign Africans in South Africa. Reuben (2008) observed that the xenophobic attacks in 2008 resulted in a major humanitarian, political and ethical crisis in South Africa. Numerous African immigrants and suspected South Africans were killed in the violence and hundreds were severely assaulted. Valji (2003, p.4) observed that “attitudes of intolerance and violence are however not manifesting themselves against all foreigners but, rather, xenophobia in this country has a visible continuity with the past, in that intolerance is targeted exclusively at blacks from other African countries. What characterizes this phenomenon as new, however, is that although attitudes of intolerance are pervasive across all sections of South African citizenry, most incidents of violent attacks have been carried out by black South Africans”.

From a broad-spectrum perspective, the concept of xenophobia can be grouped into three hypotheses, namely, 'the scapegoating hypothesis', 'the isolation hypothesis', and 'the biocultural hypothesis'(Harris, 2001, 2002). According to Harris (2001), the scapegoating hypothesis of xenophobia states that the foreign African is used as a scapegoat, someone to blame for social ills and personal frustrations, while the isolation hypothesis suggests that suspicion and hostility towards foreign Africans in South Africa exists due to international isolation. The hypothesis also explains contemporary xenophobia by recourse to internal isolation, the isolation of South Africans from South Africans, as a consequence of apartheid. The biocultural hypothesis states that Africans are victims of xenophobic attacks due to visible difference in terms of physical biological factors and cultural differences exhibited by African foreigners in the country. For example, Nigerians and Congolese, ‘are easily identifiable because of their physical features, their clothing style and their inability to speak one of the indigenous languages in South Africa (Harris, 2001, 2002).

Importantly, there have been various studies on xenophobic attacks in South Africa. Some scholars have focused on historical development of xenophobic attacks in South Africa (Tshitereke, 1999; Hook and Harris, 2000; Harris, 2001, 2002). Another stream of research is based on surveys and statistics of xenophobic attacks in South Africa (Valji, 2003; Reuben, 2008, Laher, 2009). Many scholars have analysed the issue of xenophobic attacks in South Africa in terms of economic implications (Matthew, 2008; Marcos, 2010). However, there is paucity of research investigations on television news coverage of xenophobic attacks in South Africa and its socio-cultural implications to development. Thus, the need to generate empirical evidence on current information on television news coverage of xenophobic attacks in South Africa is critical. This would help in determining the need for continuing mass media and education programmes that could promote racial tolerance as well as improve the knowledge of security issues in
South Africa. This study, therefore, examines television news coverage of xenophobic attacks in South Africa, using Youtube videos as examples.

**Research Questions**

1. What is the Users’ level of prominence given to news media report on Xenophobic attacks?
2. What is the direction of news media report on Xenophobic attacks?
3. What are the predominant themes reported by the news media on Xenophobic attacks?
4. What are the recurring comments of Users on Xenophobic attacks on Youtube?

**Scope or delimitation of the study**

Considering the scope of the study, this research focuses its strength on the news video contents of three Television Stations with international and national coverage between March – May (2015). Therefore, the study put its searchlight on the xenophobic attacks reported by three television stations, which are BBC, SABC and ENCA, and a total number of 9 videos were examined in the study. The reasons for selection of these television stations were based on their national coverage, popularity viewership rating and ownership structure; BBC is an International television station, SABC is a public service television station in South Africa and ENCA is a private-owned television station in South Africa

**Theoretical Framework**

For the purpose of theoretical backup, the development media theory was critically examined. The development media theory is a normative theory which means it focuses on how the media within a given society function against how they actually function (Mcquail, 2005). This theory postulates that the media should compromise absolute liberty to allow for co-operative work to be done between itself and the government for the purpose of developing the nation or community in which it is situated economically, socially and politically (Baran, 2009).

Development Media Theory was formulated by Mcquail in the year 1987 and as Asemah (2011 p.151) notes:

This theory seeks to explain the normative behaviors of the press in countries that are conventionally classified together as developing countries. It is pertinent to recognize certain common circumstances or characteristics of developing countries that make it difficult to apply the other normative theory of the press these include:

1. absence or inadequate supply of required communication infrastructure;
2. lack of cultural production resources;
3. limited availability of media literate audience;
4. limited supply of requisite professional skills; and
5. dependence on the developed world for technology, skill and cultural product.
The theory focuses on the promotion of industry, national identity and collaborations between the nations in which it is being implemented and its neighbours. In other words the theory’s major aim is ensuring that absolute development takes place within the society (Hanson, 2011).

Asemah (2011 p.152) citing the MacBride Report further states that:

This theory is opposed to dependency and foreign domination and arbitrary authoritarianism. It accepts economic development and nation building as overriding objectives...These the media can do by functioning as government instruments for achieving economic growth, political growth, cultural development and, national sovereignty...The media are seen as agents of development and social change in any community thus, the theory says that the media should be used to complement government’s efforts by carrying out programmes that will lead to positive behavioral change among the people.

Seen here again, is the necessary role which the media play in the development of a nation. Stated specifically, also is the role that the media should play in the bringing about a national identity and cultural development. The relevance of this theory in this study cannot be overemphasized as it establishes the media especially in developing societies as core agents of racial and socio-cultural development.

Television is a medium of mass communication and one of the most effective in bringing about behavioral and cultural change. With the platform created by development media theory, all programmes produced by television producers will have to be geared towards promoting racial tolerance among citizenry in South Africa. In addition to this, television outlets will spearhead an agenda for socio-cultural development in South Africa,

**Television and Racial Tolerance in South Africa**

Asemah (2011 p.313) observed that “development may be seen as the sum total or the outcome of efforts made by the people to improve on their conditions of living.” This definition suggests that development is only a result of the efforts or deliberate actions put in place by the people in question to actualize this occurrence, it is in no way accidental and is not limited to only materialistic development (Asemah, 2011). For it not to be limited to only materialistic development alone he also notes further that “people need to be informed; they need information on the possibilities that exist for improving on their lots and how to effect the necessary changes” (Asemah, 2011 p.313).

The information factor cannot be over emphasized as it is the information that people pay attention to, receive and remember then work upon or act upon that leads to actual development. When information is received and applied the positive or negative results of acting upon that information determine whether the individual in question will uphold the newly held behavior pattern or discard it. In other words it is the
inculcation of information that ultimately determines the development of a people (Mcquail, 2005). Moreover, Asemah (2011 p.314) notes:

The essence of development is the development of the people with change in their attitudes leading to change of habits: just changing things without concurrent change of attitude is not a healthy development. Development is a changing process of knowledge, attitudes and practices. If those things do not help change people individual knowledge, attitudes and practices then those things are not real development.

Television, as instruments of mass communication, are the avenues through which information is communicated to the general public at the same time. Television messages are so influential that they in turn influence the thought processes of the receivers. They could influence the value systems of the audience positively or negatively, depending on the intent of the mass communicated message. Journalists have clearly been defined as the ‘watch-dogs’ of society. Journalists, more than any other professionals, have (or are supposed to have) the most exposure to the world, ideas, and general human tendencies. This is a sure way through which the media could speak to the people and the people, in turn, can express their true feelings to the media.

Previous studies support the relationship between television exposure and racial attitudes. For example, frequent exposure to positive portrayals of Blacks can lead to a greater endorsement of such images and more positive attitudes toward Blacks in general (Dixon, 2008; Ramasubramanian, 2010). It is therefore important that television serve as a potent tool in promoting cultural and racial tolerance in any modern society.

Importantly, South African Broadcasting Corporation (SABC) and other private and public owned broadcast stations in South Africa have surveillance role in respect to information and news, the media being instrument to development are expected to inform and educate members of the society on specific areas of development such as security, racial tolerance, and ethnicity. The reason for media reportage on ethnicity and racial tolerance in developing societies, such as South Africa, is to tackle issues of xenophobia and insecurity in the country. It is this type of thinking that made Vittrup and Holden (2010, p.195) to assert that “television can serve positive functions. Frequent positive portrayals of minority group members interacting with majority group members in a friendly and cooperative manner can send the message that minority group members are just as important and should be regarded as equals”. Thus, racism is a perennial issue in any modern society. Nevertheless, television can play a crucial role to help shape positive racial attitudes in countries, such as South Africa. Furthermore, television stations can help portray anti-racial images and provide a platform for contributions and solutions towards tackling issues of hostility, rejection and denial among individuals in South Africa.
Method

The method used for data collection was content analysis. Importantly, in communication research, content analysis is regarded a formal system which is systematic and objective for extracting all forms of communication contents. According to (Berelson, 1952), content analysis is a research technique for the objective systematic description of manifest content of communication. Similarly, (Kerlinger, 2000) defines content analysis as a method of studying and analyzing communication in a systematic, objective and quantitative manner for the purpose of measuring variables (cited in Wimmer and Dominick, 2003). Therefore, content analysis was used in this study as a tool to extract data from the content of the selected newspapers. This was done by analyzing the frequency and prominence or importance as well as direction/slant of news on xenophobic attacks in South Africa as content categories. More so, the unit of measurement and news analysis includes features, news stories, editorials, special reports and sources of news etc.

Sample Size

In the context of this study, there is no doubt that it is impracticable to study all the television stations considering the time frame, constraint and most especially unavailability of some of the members of the population to the researcher. Therefore, only three (3) television stations were selected for the study. They are namely British Broadcasting Corporation (BBC), South African Broadcasting Corporation (SABC) and ENCA. By statistical calculation, a news video was selected per month for each of the television under study. Using purposive sampling, the researchers selected the top news videos in terms of viewership on Youtube per month, and then multiplied by three months. Thus, a sample size of 9 news videos was used for the study. Importantly, the timeline adopted for the analysis was between April 2016 and May 2016 to achieve the objectives of the study.

Unit of Measurement/Analysis

The parameters of content(s) of the units of analysis frequency slant/direction, prominence etc were tested. In case of prominence, this was determined or tested based on the viewership and users' comments on issues about the xenophobic attacks. On the other hand, slant of the three TV reports on xenophobic attacks was determined by the stand of the television i.e. favorable and neutral categories.

Results

The data analysis of this research work was based on the 9 TV news items content analyzed. These were the various TV news reports on xenophobic attacks as reported by British Broadcasting Corporation (BBC), South African Broadcasting Corporation (SABC) and ENCA between March and May 2015. In addition, the data was analyzed with the use of simple percentage and frequency tables. This study in general terms was aimed to find out the attention given by the TV News report to xenophobia issues in South Africa.
Research Question Analysis

Research Question One: What is the Users’ level of prominence given to news media report on Xenophobic attacks on Youtube?

Table 1: Distribution of Issues based on TV report

<table>
<thead>
<tr>
<th>s/n</th>
<th>News title</th>
<th>News source</th>
<th>Number of views</th>
<th>Number of comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>South Africa: Xenophobic violence against foreigners spreads - BBC News</td>
<td>BBC</td>
<td>280,965</td>
<td>723</td>
</tr>
<tr>
<td>2</td>
<td>South Africa Xenophobia: &quot;Foreigners are taking our jobs&quot; - BBC New</td>
<td>BBC</td>
<td>45170</td>
<td>223</td>
</tr>
<tr>
<td>3</td>
<td>South Africa: Xenophobic attack captured on camera - BBC News</td>
<td>BBC</td>
<td>22133</td>
<td>60</td>
</tr>
<tr>
<td>4</td>
<td>Africa 360 - Xenophobia in South Africa: myth or reality?</td>
<td>ENCA</td>
<td>52656</td>
<td>428</td>
</tr>
<tr>
<td>5</td>
<td>Xenophobic violence may cause revenge attacks - Sisulu</td>
<td>ENCA</td>
<td>192,732</td>
<td>249</td>
</tr>
<tr>
<td>6</td>
<td>Xenophobic violence not discouraging refugees</td>
<td>ENCA</td>
<td>1718</td>
<td>2</td>
</tr>
<tr>
<td>7</td>
<td>Mugabe expressed shock and disgust at ongoing xenophobic attacks</td>
<td>SABC</td>
<td>24,753</td>
<td>56</td>
</tr>
<tr>
<td>8</td>
<td>The spate of looting of foreign national's shops in Isipingo: Nomagugu Mlawe</td>
<td>SABC</td>
<td>35,444</td>
<td>95</td>
</tr>
<tr>
<td>9</td>
<td>African leaders condemn on going xenophobic attacks in SA</td>
<td>SABC</td>
<td>3,803</td>
<td>0</td>
</tr>
</tbody>
</table>

Table 2: Users’ Level of Prominence to TV reports

<table>
<thead>
<tr>
<th>s/n</th>
<th>TV News Station</th>
<th>Users’ Viewership</th>
<th>Users’ Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Frequency</td>
<td>%</td>
<td>Frequency</td>
</tr>
<tr>
<td>1</td>
<td>BBC</td>
<td>348,268</td>
<td>52.8%</td>
</tr>
<tr>
<td>2</td>
<td>SABC</td>
<td>64,000</td>
<td>9.7%</td>
</tr>
<tr>
<td>3</td>
<td>ENCA</td>
<td>247,106</td>
<td>37.5%</td>
</tr>
<tr>
<td>4</td>
<td>Total</td>
<td>659,374</td>
<td>100%</td>
</tr>
</tbody>
</table>

From Table 1 and 2, more than 52% of YouTube users viewed news reports on xenophobic attacks on foreign Africans on BBC, which also had 54.8% Users’ comments on video. This was followed by ENCA, which had 37.5% viewership and 37% of Users commented on news video. Thus, Youtube users’ gave
high prominence viewership and engagement to BBC, which is an international news media organization. In essence, BBC had the highest percentage of viewership and comments on xenophobic attacks.

**Research Question Two: What is the direction of news media report on xenophobic attacks?**

<table>
<thead>
<tr>
<th>Slant</th>
<th>Frequency</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Favourable</td>
<td>1</td>
<td>11.1%</td>
</tr>
<tr>
<td>Neutral</td>
<td>2</td>
<td>22.2%</td>
</tr>
<tr>
<td>Unfavourable</td>
<td>6</td>
<td>66.7%</td>
</tr>
<tr>
<td>Total</td>
<td>9</td>
<td>100%</td>
</tr>
</tbody>
</table>

From Table 3, more than 65% of the news reports on the xenophobic attack on foreign Africans were unfavorable, only 11.1% of the reports on the xenophobic attack on foreign Africans were favourable.

From Table 4, SABC was the only media outfit gave a favourable report on report on the xenophobic attack on foreign Africans. On the ground of neutrality, both ENCA and SABC gave reports on xenophobic attack on foreign Africans. Thus, from table 3 and 4, the direction of news report on the xenophobic attack on foreign Africans was primarily unfavourable.

**Research Question Three: What are the predominant themes reported by the news media on xenophobic attacks?**

From the findings of this study, four major themes were reported by British Broadcasting Corporation (BBC), South African Broadcasting Corporation (SABC) and ENCA between March and May 2015. These themes were:

1. **African Countries’ disapproval of xenophobic attacks** - Many African leaders condemned the attacks on Foreign Africans. Most African leaders noted that most African nations have been...
working and cooperating with South Africa; these xenophobic attacks would hamper relationship and development in African countries. For example, President Mugabe of Zimbabwe vehemently opposed the xenophobic attacks of foreign Africans; admonished the South African government to strengthen internal security in the country.

2. Looting of properties and Killing of Non-South African- Most news television reported that properties of foreign Africans were looted in Durban and Johannesburg. Most properties looted belonged to Ethiopians and Somalis compared to other foreign Africans. However, it was later reported that the government sent police to provide security for the property. It was also reported that no fewer than five foreign African were killed in the first week of the xenophobic attacks. One major implication of xenophobic attacks on foreign Africans could be reprisal attacks on South African in other African countries. Some African countries like Nigeria warned South Africans that they are not immune to socio-economic attacks in other African countries. Some Nigerian threatened that they would stop patronizing and hinder the operations of over 100 companies in Nigeria

3. Need for Orientation of young South Africans- the need to re-orient young South Africans about African solidarity; how foreign Africans have contributed to the end of apartheid and the development of the economy of South Africa. Media reports emphasize the need for young South Africans to be educated on national solidarity at schools and other institutions.

4. Lack of political will of SA Government to tackle Xenophobic Attacks. Media reports also portrayed the viewpoints of South Africans who believed that the government has been reluctant to acknowledge xenophobic attacks on foreign Africans; since the last xenophobic attacks in 2008, there had been no arrest or orientation programme to tackle xenophobic attacks. Media reports stressed the need for the government to pay attention to xenophobic attack on foreign Africans because it seems that there is lack of political will to tackle xenophobic attacks. These reports stressed the need for deterrents against xenophobic behavior, which must be spearheaded by the criminal and the justice system in South Africa. Furthermore, the government must make explicit regulations and laws that guide foreign Africans to legally integrate in the business community in South Africa.
Research Question Four: What are the recurring comments of Users on TV news report of xenophobic attacks on Youtube?

For this study, there were 1836 comments made from Youtube Users that watched news videos of xenophobic attacks. Importantly, three major recurring comments were identified for this study. These three recurring comments are:

1. **Zulus responsible for Xenophobic attacks**

Users’ comments on xenophobic attacks against foreign Africans reveal that many South Africans do not support or encourage racial intolerance. However, a significant ethnic group, which represents the Zulu people in South Africa, is the bane of racial intolerance in South Africa. According to the majority of comments, the Zulus were responsible for the xenophobic attacks on foreign Africans. Importantly, the Zulu tribe is one of the dominant ethnic groups in South Africa, which accounts for 1.4 million citizens in South Africa. Most comments on Youtube accused the Zulus for the recent xenophobic attacks on foreign Africans. Some of these comments can be read below:

   a. “How can immigrants who are self employed take anyone’s jobs. They use their ingenuity to find a need and fulfill it. The problem is these so called Zulus don’t have the fortitude and power of will to do what the immigrants have done and pull themselves out of their predicament, so they attack the more resourceful immigrants out of jealousy. I bet you one of these Zulus have the skills needed to do the jobs of the immigrants, but in South Africa that doesn’t matter as affirmative action allows unskilled blacks to fill roles they are not qualified for. Affirmative action is nothing more than saying you are qualified for a job simply because of skin color, no wonder South Africa is in the shit when their government endorses that nonsense” - Adam fisher

   b. “Lindiwe Zulu you and your king of beast Zulu are hyena hungry for innocent Africans who supported and liberated you from the apartheid cage. Now you show that you us your real face that is beast in human skin. Why nor suck the blood of whites not the poor black Africans who liberated you and you beast zulu king from the cage of apartheid zoo. Shame, hope to see you soon back into your cage.!!!!!!!!!!!!!!!” - AbdiSalam AfricanDiamond

   c. “Aparthied was so good, very good system that kept these savages at bay...Where are the whites that ruled Africa, please come back to your subjects... Kikuyu savages maim and murder Kenyans in broad day light.. In South Africa „Zulus are burning people alive.. Where were these animals when whites were in power. They were peace full and obedient or in cages” - Adam Eeleye

2. **Disapproval of killing and violence against only foreign Africans**

A majority of users’ comments elucidated that they disapproved the xenophobic attacks targeted to foreign Africans in South Africa. Many users commented that violence against foreign Africans was rooted in racial intolerance, which has hampered mutual coexistence in most communities in South Africa. Many users argued that they are many immigrants in South Africa, but it was only foreign Africans that are singled out to be attacked. Some of these comments can be read below:

   a. “It's not violence against foreigners, its violence against foreign Africans which is very ironic. Africa stood with South Africa in its struggle against apartheid, and now some black South Africans have created a new apartheid against other Africans, but the principle is the same, segregation and prejudice, D. F. Malan would be very proud of his new black champions of his legacy” - Denis Mutabazi
b. “Why do you try to stir up hate instead of trying to calm the trouble. I am white but I hated every second of the senseless attacks on foreigners by South African blacks. Even though I understand my peoples anger at the foreigners, I feel that the matter could have been dealt with forcibly but without killing. Please try not to create more hate and anger between white and black South Africans if you want to live in South Africa” - Abraham Eshetu

c. “Some proof... Do u see a single white in any of these videos??? And whites are very common in South Africa... When someone from America comes into my shop do i burn him??? Noooooo because we are civilized... I know some black people... But im sorry i believe there is a reason why apartheid excited... Because of what u see in these videos... U dont just kill whites u kill each other like savages” - runek10

d. This is just evil. Burning your African brothers and sisters alive because they got a better life than you. Did it ever acaur to you the reason you not getting a job is because you fucking lazy. Can’t wait for the white south African to start killing them but this time you will not get nowhere to run u evil people - aicha sagbeh

3. Contribution of Foreign Africans to South African Economy and Development

A majority of users’ comments elucidated that xenophobic attacks targeted on foreign Africans in South Africa was not justified because foreign Africans contributed significantly to the eradication of Apartheid in South Africa. Some users argued that foreign Africans have been contributing significantly to the economy of South Africa in terms of trade and knowledge transfer. These users complained that xenophobic attacks targeted on foreign Africans in South Africa can be seen as an act of ingratitude and intolerance. Some of these comments can be read below:

a. This is how they pay us back. We helped them to get Independents. We welcome them in out Countries and gave them a places to stay with free educations. We fought for them until they become free Nation with freedom.. But today they have forget where they came from. They have the power to chased and killed there fellows Africans.. They have the power to say all Africans should go back? Oh my God - Kerry Johnson

b. There are lots of foreign people (black and white) that have invested and work in SA, they have created jobs and paid tax into SA's economy, are the black people going to protest about them, carry on and see all the foreign company's and their staff pack up and leave and you will have another Zimbabwe to live in.- Sue F

c. Do you know president zuma lived in mozambique 10 years illegaly. President Tuto. Do you know how many Mozambicans died because of South Africa people. Did you know president samora machel died helping south africa. You people one day will see that you are very idiote and choose your black neighbors to kill- Osvaldo Cordeiro Checo

d. I am African, so how do you go kill someone who is African as well ?? I cant seem to understand, why kill the peace? S.A is a great country, i don't get how someone can do this to fellow African, we are suppose to unite as one ? Killing people for what? I have never felt so ashamed pl south Africa, you kill foreigners from the same continent as you. Do you know that those foreigners are what makes a country grow ????- Lorraine Alberto
Conclusion

Importantly, the problem of xenophobia in South Africa can be interlinked to discrimination against foreigners, which takes place around the world, especially in countries experiencing political or economic upheaval. The rise of sentiments of racial intolerance against foreigners in South African society has occurred for a very long time. The television news media as a social institution is expected to report all issues that affect racial intolerance and human right advancement in any modern society. This becomes necessary because the fundamental right of individuals is of equal importance to the sustainable development of any nation. As observed in the study, it would be necessary for the television news media to give equal attention to the problem of xenophobia in South Africa. It was likewise observed that issues on xenophobic attacks on foreign Africans did not receive a favorable coverage by the TV news media. It is recommended that the television news media should make significant effort to set agenda or make racial intolerance more important through information dissemination and packaging of reports. In essence, sufficient attention should be given to matters of xenophobic attacks on foreign Africans by the South African press. Furthermore, the television news media should adequately utilize its developmental theory/function for the positive change and development in South Africa.

Reference


The OBC Muslims: Some Little Known Marginal Communities of West Bengal, India

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Abstract: Muslims are the principal minority of West Bengal, a state situated in the eastern part of Indian sub-continent, comprising about 27 per cent of the state’s total population. Sociologists and social anthropologists have studied the social organization of many Indian communities such as the Tribals and the Hindu castes but unfortunately such studies on the Muslims of West Bengal as well as India with regard to their society, economy, culture and ethnicity are very negligible causing ample loopholes in our perception and information about this very large minority from empirical point of view. As a result of which there seems to be huge lacunae in socio-scientific research and perceptive. The present paper is an attempt to examine the socio-economic and educational situations of the Other Backward Class (OBC) Muslims of West Bengal and an especial effort has also been made to find out the factors contributing as blockage in their development and social change. The paper is based on both primary and secondary data. Various relevant published and unpublished literatures have been consulted besides authors’ empirical observations of the Muslim communities of West Bengal at the micro level as well as macro level.

Keywords: Muslim minority; socio-economy; deprivation; backwardness; development

Introduction
The economic growth of a country cannot be attained without development of its entire component at micro level as well as macro level. Poverty is considered to be a curse to any economy and Muslims are by and large the poor segment of the Indian society despite the fact that they have power and will to have education and to work in any area. They are both educationally and economically backward communities

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in India in spite of the fact of power and will (Rahaman and Bhuimali 2011: 9). Muslims, in various proportions, are found to live in more or less all over the States and Union Territories of the sub-continent. It has been reported that the Muslims of this democratic, secular and republican country have fallen behind the mainstream society in comparison to the other religious minority communities of the nation owing to various external and internal factors keeping this largest minority as socio-economically and educationally backward in the present time when modernization is the order of the day. So far their economic, educational and political empowerment are concerned, they are the most marginalized, impoverished, deprived, and secluded community retarding in their normal progress in the spheres of economy, politics, education, knowledge and culture. The all-round eccentric troubles faced by them are interrelated to anxieties relating to discrimination, equity, security and identity (Hossain 2012: 45).

As Mondal (1994: 199-200) points out, “The Muslims in Bengal as well as in India are a cultural and religious minority and living in dominant Hindu cultural milieu. The majorities are no doubt resourceful in adapting themselves to the newly emerging institutions than the minorities by virtue of their education, enlightenment and privileged position in the society. As a matter of fact the Muslim minority is facing a serious trouble to develop and progress as it lacks the resources to provide new ideas and thoughts towards its members. As a minority the Muslims are also facing problems to develop their society as they need help from the majority.” The term Minority denotes a group of people who are subjected to prejudice and discrimination in a given society. Sociologically speaking, minority groups are not necessarily numerically small group of people rather they are merely victims of discrepancy and unequal treatment in a given society (Abraham 2009: 135-136). The Oxford Dictionary of Sociology (2009: 476) declares that “Since the 1930s this term has been applied to social groups that are oppressed or stigmatized on the basis of racial, ethnic, biological, or other characteristics. Louis Wirth, for example, defines a minority group as ‘a group of people who, because of their physical or cultural characteristics, are singled out from the others in the society in which they live for differential and unequal treatment and who therefore regard themselves as objects of collective discrimination’. However, seen in these terms, a minority group could in fact constitute a numerical majority in any society – for example Blacks in South Africa. It might be more useful, therefore, to distinguish between groups which are actually a minority in numbers and those which are marginal in terms their access to power.”

Mondal (1992: 157) has pointed out that India is “secular”, “democratic” and a “republic” by the Constitution which established recognition to all professed religions and group identities. The social, economical and political justice; faith, expression, liberty of thought, belief, and worship; equal status and like opportunity to each and every citizen of the country and seeks to preserve fraternity among its citizens with the objective of the individuals’ dignity and guarantee the unity of the country which the Indian Constitution promises to all its citizens. Taking indication from the Constitution of India, Mondal (1992: 157) further indicates, “Part III of the Constitution deals with the Fundamental Rights and gives
assurance to all citizens of India that no discrimination will be permitted on the grounds of religion, race, caste, sex or place of birth (Article-15). This acquires significance in the case of Muslims on the ground of their position as a religious or cultural minority in India. The Constitution also assures equality of opportunity to all in the matters of employment under government (Article-16). It gives freedom of speech, expression, residence, acquisition and disposal of property, practice of profession, free association and free movement (Article-19), gives the right of freedom of religion (Article-25), protects the cultural and educational rights of the minorities (Article-29). All these provisions also acquire significance when applied to the Muslim community, who constitutes one of the important cultural minorities of the country”.

Every Muslim citizen of India is individually a member of a distinct religious community, which together with other religious communities constitute the Indian nation. Therefore, every Muslim citizen of this country individually and Muslims as a collectivity are the part of Indian nation. Therefore, minorities are underprivileged section of a country or state and the concept of majority and minority, thus, turn largely into socio-political concepts consistent with the above statements. It might be more helpful, thus, to make a distinction between groups which are actually a minority in numbers and those which are marginal in terms of their access to power and privileges in a given society.

**Land and the People**

As a constituent state of the Indian union, West Bengal was created on 15th August 1947, by the partition of the undivided British Indian province of Bengal into West Bengal which covers the bottleneck of India in the east, stretching from the Himalayas in the north to the Bay of Bengal in the south. In the north it is surrounded by Sikkim and Bhutan, east by Assam and Bangladesh, on the south by the Bay of Bengal and on the west this Indian state is surrounded by Orissa, Bihar and Nepal. Thus, West Bengal has three international frontiers to the north, east and west. When India became independent in 1947, Bengal was partitioned between India and Pakistan. West Bengal remained in India’s share and Bangladesh, formerly East Pakistan, became a part of Pakistan (Rahaman and Bhuimali 2011: 77). Muslims in West Bengal are fairly more in the rural areas owing to their ties with the land. What is significant to note in this context is that the outcome of involvement ensuing in the movements of the Muslims away from West Bengal towards the country now called Bangladesh, occurred largely in the urban areas. Nevertheless this does not actually mean that the Muslims in rural areas, after partition, did not leave West Bengal. They left the region in lesser numbers in comparison to the urban areas and migration of the Muslims from rural neighbourhoods to the urban neighbourhoods of Calcutta and other towns is smaller in number (Mondal 1994: 56).

The largest Muslim concentration of around 47 per cent to the total India’s Muslim population is in three states like West Bengal, Uttar Pradesh and Bihar consisting of 25 per cent, 18.5 per cent and 16.5 per cent respectively as the 2001 Indian census report estimates. While in the states like Assam (31%), West
Bangladesh (25%) and Kerala (24.7%) Muslims are found to reside in high concentrations. In West Bengal, it is estimated that one-fourth of the entire state population are the Muslims who constitute the largest and principal minority of the state concerned with a population potency of around 96 per cent to the total minority population of West Bengal. Muslims of this state are found to reside in all the districts in diverse proportions and there are twelve such districts where they represent around 25 per cent population to the entire population of the districts and in the districts like North Dinajpur, Malda and Murshidabad they consist of more than 50 per cent of the entire population of the districts according to the 2001 census report estimates (Hossain 2012: 46-47).

Stratification and Heterogeneity
Despite the fact that Islam opposes social stratification and its value system stresses equality and universal brotherhood among its followers, social stratification is very conspicuous in Indian Muslim society and they are separated into different social groups and subgroups along ethnic, social and cultural lines organized in a stratified social order in empirical context. Within the Indian Muslim society, the segmentation and the system of social stratification is a situational development conflicting with the egalitarian norms of the Islamic social system. However, the textual Islam and the lived Islam are not the same or one thing so far as Islamic ideology and Muslim societies are concerned. Due to immense historical, social and cultural diversities among Muslim communities all over, the problems faced by them are also not the same and consequently there are social, economic and political challenges and impediments. Besides, the Muslims have been definitely facing severe issues in contemporary India and more so for the reason that they are incorrectly portrayed as a monolithic and homogeneous group while the reality is that Islam and Muslims are not monolithic, rather the live Islam has great diversity and heterogeneity (Hossain 2013: 278-279).

Other Backward Class (OBC)
The term “OBC” stands for Other Backward Class. A community is classified as “OBC” when it meets the criteria as “backward” based on a complex set of socio-economic and educational criteria specified by the National Commission on Backward Classes (NCBC) (Kumar 2011: 33). With the dawn of independence and subsequent promulgation of the Constitution of India, these backward segments of the population were identified and targeted for special treatment and these people were termed as Scheduled Castes (SCs), Scheduled Tribes (STs) and Other Backward Classes (OBCs). With reference to job, education, welfare and development of these people, various compensatory policies are enacted for all three categories of people.

Muslims cannot be the SCs because this category is restricted to Hindus, Sikhs and Buddhists but the STs can be Muslims though they are not many. A few such minute Muslim tribal groups are the dwellers of Lakshadweep, Gaddis and Bakrewals of Jammu and Kashmir. This clearly means that only the third
category, OBCs seems to be open for them. Despite the socio-economic backwardness of the Muslims, they could not take advantage of this for a long period of time for the most part as it remained an unclear category and criteria for inclusion in this category were not specified in the Constitution (Hasnain 2010: 35-36). The backward classes in India constitute one-third of the total country’s population usually made up of three main groups such as Scheduled Castes, Scheduled Tribes and Other Backward Classes (OBCs). They are huge in numbers and are a mixed category of people with boundaries that are not always clear. As the OBCs are a residual category; their population in society is largely indistinguishable varying from one religious community to another. It is indeed unfeasible for us to present an exact statistical account of their numerical strength (Moinuddin 2003: 4905). On the other hand the State is empowered by Article 340 to appoint a commission ‘to investigate the condition of socially and educationally Backward Classes’. Two such commissions have so far been appointed at the all India level viz., Kaka Kalelkar Commission and B. P Mandal Commission by the Govt. of India for the systematic study of the OBCs (SCR 2006: 191).

**Kaka Kalelkar Commission**

The First Backward Classes Commission was Kaka Kalelkar Commission. It was appointed in 1953 under Article 340 of the Constitution and put emphasis on the lower status in the *caste* hierarchy as the critical factor for backwardness along with other considerations viz., educational levels, levels of income and representation in public employment. The Commission submitted its report in 1955 and Kaka Kalelkar Commission’s Report was the first case in which certain *castes*/communities among Muslims and other religious minorities were also declared backward and brought within the purview of affirmative action. The Commission identified more than three thousand *castes*/communities as ‘OBC’ (SCR 2006: 191; Kumar 2011: 22-23).

**B. P. Mandal Commission**

The Second Backward Classes Commission appointed in 1980 was B. P Mandal Commission. In order to identify socially and educationally backward classes, it adopted eleven criteria under three major headings, viz., social, educational and economic and also relied on the *caste* criterion, though, the tangible indicators to ascertain a *caste* or any social group as ‘backward’ incorporated lower position in the hierarchy of *caste*, lower age at marriage within the group, inaccessibility to drinking water, average value of family assets is lower, higher rate of female work participation, higher school dropout rate, occurrence of *Kutcha* houses is higher and the like. Different yardstick was employed in case of non-Hindu communities. The Commission identified 3743 *castes* (SCR 2006: 191; Kumar 2011: 23).
Therefore, Other Backward Classes form a major underprivileged group of people who remained deprived in terms of education, economy, political empowerment and social benefits for centuries in India. From an all-around category as during the period of British, the backward classes of this country as a category has gradually emerged to explicitly refer to those caste groups who occupy the middle place in the social hierarchy and fall back in terms of various human development indicators viz., educational, economic, and others (SCR 2006: 192; Kumar 2011: 25).

OBC Muslims in West Bengal

The then Left Front Government of West Bengal had stated that more than one crore and seventy two lakh Muslims would get the privileges of reservation in services and posts on account of their backwardness. Moreover, the present state Government (TMC) includes 86 percent of the Muslims from the entire Muslim population of the state in to the Government list of OBC groups for Muslims in a declaration. Therefore, for the most part the Muslims of West Bengal are the OBC Muslims today.

The Government has further categorized those OBC Muslim Groups in two broad categories, 'Category-A' which implies 'More Backward' and 'Category-B' which denotes 'Backward' on the basis of their relative backwardness. All total 53 Muslim groups have been declared as OBCs among which 49 Muslim groups are declared as 'More Backward' and the rest 4 Muslim groups as 'Backward'. Accordingly the OBC Muslim groups Abdal, Baidya Muslim, Basni or Bosni, Beldar Muslim, Bepari or Byapari Muslim, Bhatia Muslim, Bhatiyara, Chowduli, Chutor Mistri, Dafadar, Dhukre, Dhunia, Fakir or Sain, Gayen, Ghosi, Hajjam, Hawari, Jamadar, Jolah (Ansari-Momin), Kalander, Kan, Kasai, Khotta Muslim, Laskar, Mahaldar, Majhi or Patni Muslim, Mal Muslim, Mallick, Midde, Molla, Muchi or Chamar Muslim, Muslim Barujibi or Barui, Muslim Biswas, Muslim Haldar, Muslim Mali, Muslim Mondal, Muslim Piyada, Muslim Sanpui or Sapui, Nashya-Sekh, Nehariya, Nikari, Patidar, Penchi, Rajmistri, Rayeen or Kunra, Sardar, Shershabadia, Siuli (Muslim), Tutia are included in the 'Category-A' considered as the 'More Backward' segments within the Muslim communities of West Bengal and the rest four groups viz., Darji or Ostagar or Idrishi, Dhali (Muslim), Pahadia-Muslim and Tal-Pakha Benia are included in to 'Category-B' regarded as 'Backward' sections as per notification no. 6309-BCW/MR-84/10 dated 24-09-2010 prepared by the Backward Classes Welfare Department, Government of West Bengal and also as per the data found in Anandabazar Patrika, (Bengali Daily), dated 2nd October, 2010.

After the defeat of the then Left Front Government who already declared some Muslim groups of West Bengal as deprived and socio-economically backward and also included in the existing OBC list of West Bengal in two different categories which have already been mentioned above. Again after coming to power the newly formed TMC Government of West Bengal has conducted a sample survey in order to find out the relative backwardness of this underprivileged segment of the people, belonging to the Muslim community, who had been bypassed from inclusion in the previous list of OBCs. By the endeavour of the
existing Hon’ble Chief Minister of this state, these underprivileged segments of the people are now included in the latest list of backward classes of the state, commonly known as OBC list. In addition to Notification No. 6309-BCW, dated on 24th Sept. 2010, the Hon’ble Governor of this state also happily grouped the specified classes into the list of OBC under category-A and category-B.

The different Muslim groups of West Bengal who fall under the extreme backward category-A are Bhangi, Dhatri/Dai/Dhaity, Halsana, Kayal, Naiya, Gharami, Goldar/Golder, and Shikari/Sikari. Besides the aforementioned groups of people Abdal, Akunjji/Akan/Akhan, Bag, Chaprashi, Deptari, Dewan, Dhabak, Gazi, Khan, Kolu Muslim, Shah, Sahaji, Sadhukhan, Malita/Malitha/Malitya, Mistri, Mondal, Paik, Pailan, Purkait, Sana, Sareng, Sarder, Sarkar, Tarafdar, Mouli and Sepai have been included in to the Category-B of the comparatively less backward class of Muslims in accordance with the Notification No. 1673-BCW/MR-209/11 dated on 11th May, 2012.

Contemporary Social Situation of the Muslims

There is a lack of data regarding Muslim communities in India and the information available in the census includes a broad count by religion without present socio-economic information in relation to religion. As well, there are a very small number of studies on the economic profile of Muslims of this country. Although it is reported that there are several studies and analyses of Muslims in the possession of the Government of India based on census reports, however, these are yet to be made public (Kazi 1999: 24). Each consideration of the socio-economic situation of the Muslims in India needs to mean that diverse issues faced by them are multilateral as they at the same time face problems concerning identity, security, justice and equity like all other minorities of the country and the interaction of these dimensions is at the core of the socio-economic and political processes that the community is exposed to on a daily basis. As a result of unavailability of relevant ‘hard and unbiased’ data, an empirical searching of these multifaceted problems is difficult and such information constraints are obviously a further limitation for security and identity-related apprehensions (Besant and Shariff 2010: 02).

The socio-economic condition of the Muslims in India can be assessed by examining the indicators like occupation, economy and land ownership, work participation, levels of living, literacy and schooling condition among them (Mondal 2000: 101). As Moinuddin (2013: 75-76) remarks,

"Like any other minority community the Muslims suffer from a number of socio-political problems. Some of these stem from their specific social organization, some from their religious conservatism and some from their relative isolation from the dominant Hindu groups. Many reports on the specific situations of the Muslims in India like the Sacher Committee Report have pointed out that the Muslims lag behind their Hindu counterparts in almost all aspects of life – like education, occupation, Political participation etc. The microscopic presence of the Muslims in the above mentioned spheres of life make the problem more complex. The specific belief system, value orientation and cultural practices of the Muslim community are believed to be important variables in studying the roots of such problems. At the same time there are some ideological issues that play a significant role in this respect. As a result the processes like westernization, modernization and globalization have little impact on them."
Conversely, the socio-economic situation of the people under study has not transformed much in post-independent India. The various reports and research studies clearly reveal that Muslims in India are educationally and economically backward and the backwardness faced by them is a cyclical and ongoing process leading to economic backwardness. They are suffering from ample problems like other minorities; besides, they face problems relating to security, identity, and equity. The feeling of insecurity among the Muslims is very high, for the most part in communally sensitive states and among women. Ghettoisation is an outcome of insecurity and prejudice in housing, schools and jobs. Insecurity adversely affects their mobility, predominantly of women leading to situations in which Muslims are not competent to completely exploit economic opportunities. Educational backwardness is a key concern of the community besides limited access to good quality schools is a leading obstruction that affects female students more adversely (Rahaman and Bhuimali 2011: 08).

Economic Status

Educational achievement and employment opportunity, which are considered to be crucial for the socio-economic development of individuals, are the two major problems faced by the Muslims in India. It is evident that Muslims in India as well as in West Bengal, in terms of quantitative and qualitative education, are lagging behind. One of the prime reasons for educational backwardness among the Muslims are their poor economic situation, meager number of Government and Government aided schools exist in such areas where large number of Muslims inhabit and there is limited scope of employment opportunities to the educated people within the community. Muslim women are lagging behind in education probably owing to socio-cultural pattern of the family and the society. The pessimistic attitude to the education of the girls and the lack of accessibility of infrastructural amenities for education in Muslim concentrated areas are two factors which act as bottleneck to their development. They do not have adequate access to far away schools. In order to provide job oriented education and to set up adequate number of technical schools separately for male and female in the Muslim concentrated areas is necessary (Rahaman and Bhuimali 2011: 84 and 91).

Muslims in rural Bengal are mostly engaged in agricultural pursuits. Most of them work as agricultural labour and many of the others suffer from joblessness and under-employment. Educational facilities are terribly meagre and, if these are accessible to some extent, they are beyond easy reach of the huge number, owing to the cost involved. Prompted by the need for alternative self employment a large number of them, for survival, specializes in a few crafts such as carpentry, tailoring, needle and zari works, embroidery, paper crafts, gold smith and the like and such odd jobs like rickshaw pulling draw these people to cities including Bombay and Delhi. Kolkata is rather insignificant as it provides very restricted scope for their survival in the city (Siddiqui 2011: 213 and 214).
One of the key determinants of social status of an individual is her or his employment which is a social certainty and a base of self-esteem although it is an economic activity. In order to take part in the developmental activities of a nation, employment presents landscapes to both men and women. Moreover, the productive people can contribute their might to the income of a nation while the unproductive people mainly depend on others. Therefore, it is very depressing to note in this context that although in the development process a large section of women are capable to contribute their share, they are being considered as unproductive because of the widely prevalent notion that the role of women should be confined in the household and the expectation for women that they will happen to be just good housewives and good mothers. But since no development is achievable ignoring and bypassing more or less half of the entire human population i. e. the women citizens, it is essential to note that the participation in and access to social and economic activities of women is indispensable not only for their own development but also for the development of the country (Azim 1997: 89). As Mondal (1994: 196) observes,

“Though perfect statistical data is not available, yet it has been observed that Muslims in Bengal are poor and their society is characterized by poverty, impoverishment and destitution. Besides unemployment, lack of resources and high market price, the poor economic condition of the bulk of the Muslim people is also due to their low income, high expenditure and uneconomical habits. These are mainly due to recurring growth of population in Muslim households, a few working hands being called upon to support large families and certain cultural restrictions and sanctions to their earning and expenditure. It has been examined that besides external forces and structural constraints, the poverty of the Muslims is also due to certain aspects of their way of life. Poor economic condition, indebtedness and marginality of the Muslims perpetuate a kind of poverty and culture that do not allow them to attain a style of life that can be receptive to modernity and progress. The economic backwardness of the Muslims is a cyclical and on-going process as it is leading to social backwardness and that in turn resulting into economic backwardness further.”

With reference to the economic status of the Muslim women in India, Kazi (1999: 25) has remarked that it is very hard to make out the specific roots behind their low employment status owing to lack of existing research and analysis in the sphere of employment of the Muslim women whereas their educational status most apparently execute a significant pressure in both urban and rural areas on the type and ranks of their employment.

**Educational Status**

The Education Commission under the Ministry of Education, Govt. of India stated in the year 1966 that the responsibility of the educational system is to convey to different social groups and classes simultaneously to support the materialization of an egalitarian and integrated society. In contrast, unfortunately, the development of education in India is very poor. Although different efforts have been made after independence to spread education among its citizens, the outcome is very unsatisfactory with particular reference to minorities or weaker sections of Indian society (Mondal 1997: 19). There is also a common belief that Muslim parents think that education is not essential for girls and that it may instil a
wrong set of values. Even if girls are enrolled, they are withdrawn at an early age before completion of her education in order to marry them off which leads to a high drop-out rate among Muslim girls. The problem is found in the non-availability of schools within easy reach for girls at lower levels of education, lack of hostels for girls, absence of lady teachers and accessibility of scholarships as they move up the ladder of education (SCR 2006: 85). However the rates of enrolment have increased considerably at the primary level but many students who register soon drop out and as a result very small number of them manage to get beyond the primary stage.

Inequality and differences between communities is one additional critical aspect of the broader disparity in India. It is a well-known fact that the literacy and educational levels of the Muslims are under the national average notwithstanding the fact that the census reports of India remain silent on the status of Muslim education. In the field of education gender discrimination is one key element of educational disparity (Hasan and Menon 2004: 47). There is no doubt that Muslim women are educationally backward and have low work participation rate, yet, this reality cannot be understood in an adequate way and there is need for taking on a broader socio-economic, political and programmatic standpoint along with the existing heterogeneity in terms of region, sect, class and gender. By adopting such perspective, it would be possible to understand the real reason behind the low educational level of the Muslim women mostly in higher and job oriented education and also to set up necessary measure relating to both at the community level and at the level of policy or programme (Hussain 2010: 53). As Mondal (1994: 197) points out,

“Education is by far the most important cultural trait through which a society changes and makes progress. But it has been seen that the Muslims of Bengal are educationally backward. The resultant effect of educational backwardness creates a type of socio-cultural atmosphere which perpetuates the elements of tradition and backwardness among the Muslim masses. All these together have greatly retarded the emergence of social reform movements in the direction of modernity, development and progress of the Bengal Muslim community.”

With a population of 16,075,836 individuals Muslims in West Bengal constitute 25.20 percent to the total state population, out of which 84.26 percent of the Muslims live in rural areas and 15.74 percent in urban areas and the rate of illiteracy among Muslim women of this state is 61.07 percent compared to 47.04 percent among Hindu women as per the 2001 census report. The National Family Health Survey report of 1992-93 reveals that in the age group of 13-49 years, 1.4 percent of Muslim women have read up to high school only while 6.9 percent of non-Muslim women are in this category. Again the percentage of Muslim women in the post-high school education was stated to be 0.5 while that of non-Muslim women is 4.6 and the ratios of Muslim and non-Muslim in the categories are 1:7 and 1:9 (Siddiqui 2011: 213).

Concluding Observations
Thus far, the analysis presented in the preceding review, it is observed that the Muslims of West Bengal are lagging behind the mainstream in almost every sphere of development. From the perspective of
socio-economic situation, educational status and political empowerment, Muslims are the most marginalized, secluded and deprived section of the society. Poverty and backwardness have retarded this community in their normal progress in the field of education, knowledge, economy, political participation and culture. This unfortunate reality of the Muslims has also come to light in the Sachar Committee Report and the Ranganath Misra Commission Findings. As a consequential result of educational backwardness among the Muslims of this region it forms a sort of socio-cultural setting that keeps the elements of conventionality and tradition-bound nature among the Muslim masses, retarding social change and transformation. On the other hand, their economic backwardness is a recurring and constant process as it leads to social and educational backwardness which in turn results in further economic backwardness. This complex dilemma faced by them is linked to anxieties concerning identity perception, protection, discrimination, justice and equity. Muslims of West Bengal are a minority community both in numerical sense and in terms of their position in greater socio-economic and political structure and the culture of the state. Thus, the Muslims, as citizens of India and as members of the largest minority population of the nation, face considerable challenges even after the completion of six decades of Indian independence.

The backwardness of any community in any part of the country is a national calamity and should be recognized as an obstacle of the whole nation. In order to overcome this hazard, the country as a whole should act together to get rid of such evil. Under such a context what needs to be done is to build awareness for development, greater inspiration, self-reliance and self-correction within the community. Moreover, mass participation of the community is essential in almost all the available developmental programmes. For the over-all development and change in the Muslim society, they need to come out from their low level of aspiration, frustration, fear psychosis and tradition bound nature which grew out of situational depression and cultural retardation.

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Sacher Committee Report, (2006), *Social, Economic and Educational Status of the Muslim Community of India*, A Report, Prime Minister’s High Level Committee (Chairperson- Justice Rajindar Sacher), Cabinet Secretariat, Government of India.

Education and Socio-economic Marginalization of Muslim Women: A Case Study of North 24-Parganas District in West Bengal

Notan Bhusan Kar¹ and Bhola Nath Ghosh²

Abstract: The Muslim women tend to suffer not only the gender problem, but also the impoverished minority status of the Muslim community. Muslim women are at double disadvantage with low educational status and community pressure. Their lives, movements in public places are under constant scrutiny and control. Education is the oxygen of the human beings in the contemporary technology-driven world of knowledge and economy. Low level of literacy and education impede national growth and lead to violation of human rights as well as the rights of religious community. At the same time, higher literacy rates bring social change, cultural advancement and economic development.

The present study examines the reciprocal relationship between literacy and socio-economic determinants as consequences of the low level of socio-economic development of the Muslim Community in West Bengal and an attempt to analyse the empowerment of Muslim women in the three selected villages of the District North 24-Parganas is made. The study concludes with the suggestions to enhance Muslims literacy, which is an ultimate solution to reduce existing group disparities in socio-economic development in West Bengal.

Keywords: Muslim women, education, empowerment of women, work participation rate

Introduction

Social change in Muslim community and particularly of Muslim women has not received much scholarly attention from the sociologists or other social scientists. Muslim women in India are still vulnerable and it

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is a fact that their emancipation could be a crucial step towards the development of their community. The present status of Muslim women reflects the dominance of traditional and conservative attitudes in their community. But with increasing literacy among the Muslim women, their outlook, thinking and perception have been under gradual changes and at the same time it has aided changes in the overall Muslim community in India.

According to 2011 census of India, the Muslim population constitutes of 27.1% of West Bengal’s total population i.e. 91,276,115. Hinduism is majority religion in the state with 70.54%. These two communities (Hindus and Muslims) share more than 97% of the total population.

### Table 1: Population of West Bengal by Religion - 2011

<table>
<thead>
<tr>
<th>Description</th>
<th>Population</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hindu</td>
<td>64,385,546</td>
<td>70.54 %</td>
</tr>
<tr>
<td>Muslim</td>
<td>24,654,825</td>
<td>27.01 %</td>
</tr>
<tr>
<td>Other Religion</td>
<td>942,297</td>
<td>1.03 %</td>
</tr>
<tr>
<td>Christian</td>
<td>658,618</td>
<td>0.72 %</td>
</tr>
<tr>
<td>Buddhist</td>
<td>282,898</td>
<td>0.31 %</td>
</tr>
<tr>
<td>Not Available</td>
<td>228,267</td>
<td>0.25 %</td>
</tr>
<tr>
<td>Sikh</td>
<td>63,523</td>
<td>0.07 %</td>
</tr>
<tr>
<td>Jain</td>
<td>60,141</td>
<td>0.07 %</td>
</tr>
</tbody>
</table>

Source: Census of India - 2011

Hinduism is majority religion in State of West Bengal with 70.54 %. Muslim is second most popular religion in State of West Bengal with 27.01%. In West Bengal state, Christinity is followed by 0.72 %, Jainism by 0.07 %, Sikhism by 0.07 % and Buddhism by 0.07 %. Around 1.03 % stated ‘Other Religion’, approximately 0.25 % stated ‘No Particular Religion’.

In comparison to the other religions or groups residing in West Bengal, the Muslims have been lagging behind the mainstream communities in terms of socio-economic condition, livelihood pattern, educational status and cultural life.
Since independence in 1947, the socio-economic condition of the Muslims in India has not changed notably. From time to time, Govt. of India had appointed various committees to find out the causes of educational and economic backwardness of the Muslim community. Among them, one is the *Ranganath Misra Commission* (2007) that came out with the statement that Muslims are socially, economically, educationally, politically and culturally underprivileged and are far behind the mainstream of Indian society. The other *Sachar Committee* (2006) in its detailed report stated, poverty is the main cause of poor education among the Muslims in India. In 1993, Government of India also acknowledged them as the “National Educationally Backward Minority”.

However, it is admitted that “Empowerment of women” is the key route for the development of any society. Unfortunately, only a few studies or research have been done on the dismal condition of Muslim women in India. In the book “Educating Muslim Girls: A Campaign of Five Indian Cities” is an empirical work based on the first hand information of Zoya Hasan and Ritu Menon (2005) that critically analyzed the status of education of Muslim women in India. In the book “Rural Muslim Women: Role and Status” by Sekh Rahim Mandal (2005) analyses the socio-economic and cultural condition of the Muslim women and their problems in the district of Siliguri sub-division in West Bengal. Suman K. Kundu and Ananya Chakraborty (2012), in their article “An Empirical Analysis of Women Empowerment within Muslim Community in Murshidabad District of West Bengal” have examined the issues related to Women Empowerment within Muslim Community. Md. Intekhab Hossain (2013) in the article “Socio-Economic and Educational Status of Muslim Women: a Comparative Outlook” described the miserable condition of the Muslim women in West Bengal.

**Areas of Empirical Studies**

The primary data has been collected from three villages namely ‘Matikumra’, ‘Rajkuber’ and ‘Simulia’

<table>
<thead>
<tr>
<th></th>
<th>Total</th>
<th>Males</th>
<th>Females</th>
<th>(%) males</th>
<th>(%) females</th>
</tr>
</thead>
<tbody>
<tr>
<td>West Bengal</td>
<td>24654825</td>
<td>12640092</td>
<td>12014733</td>
<td>51.27</td>
<td>48.73</td>
</tr>
<tr>
<td>Rural</td>
<td>19146627</td>
<td>9784832</td>
<td>9361795</td>
<td>51.10</td>
<td>48.90</td>
</tr>
<tr>
<td>Urban</td>
<td>5508198</td>
<td>2855260</td>
<td>2652938</td>
<td>51.84</td>
<td>48.16</td>
</tr>
</tbody>
</table>

Source: Census of India-2011
under “Deganga” Block; “Chowrasia” Gram Panchayat and District North 24-Parganas of West Bengal. The sampled villages are mostly dominated by Muslim community.

**Objectives**

This study mainly seeks: (i) to understand the level of education among the Muslim women in these areas (ii) to explore the status of employment amongst Muslim women and (iii) to examine their working pattern as well as socio-economic condition followed by a few observations and remarks.

**Educational situation of Muslim Women in West Bengal**

After six decades of independence, the majority of Muslim women belong to the economically impoverished and politically marginalized sections in Indian society and is in the most disadvantaged condition with the least literacy rate. The *Gopal Singh Committee* instituted by the Government of India in 1983, declared that Muslims are a ‘backward’ community in India as well as in West Bengal.

One of the most crucial instruments of empowerment of women is education. The policy calls for special measures to be undertaken to universalize education, eradicate illiteracy, create a gender-sensitive education system and develop vocational and technical skills among the women. It would also enable the women particularly the Muslim women to take up employment and become financially empowered. In general, Indian women are relatively undereducated. Families are far less likely to educate girls than boys, and far more likely to pull them out of school due to social norms, fear of violence and expect them to help house keepers at home. India has the largest population of non-school going working girls in the world (UNESCO). Within this picture of overall poor statistics, it is a predictable certainty that the corresponding figures for Muslim women are still lower than any other community and the situation of West Bengal is not an exception.

The *Sachar Committee* Report stated that 4% of all the children of the Muslim community are enrolled in recognized schools and a total of 9% attend some sort of school recognized or unrecognized and 91% do not have any school to attend. Those enrolled hardly complete school education and 90% of the enrolled get dropped out.

Educational backwardness is a key factor responsible for the social, cultural, economic, and political backwardness of the Muslim community in Bengal. It is well known that the literacy and educational levels of Muslims in West Bengal are far below the National average.
Literacy rate in West Bengal is 77.08% and significantly higher than the national average of 74%. But among the Muslim community literacy rate reached to only 57.18%, which is much lower than the national average figure.

**Table 3: Literacy Rate 2001 and 2011 by District**

<table>
<thead>
<tr>
<th>Sl. No.</th>
<th>District</th>
<th>Literacy rate in 2001</th>
<th>Literacy rate in 2011</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Purba Medinipur</td>
<td>80.16</td>
<td>87.66</td>
<td>7.50</td>
</tr>
<tr>
<td>2</td>
<td>Kolkata</td>
<td>80.86</td>
<td>87.14</td>
<td>6.28</td>
</tr>
<tr>
<td>3</td>
<td>North Twenty Four Parganas</td>
<td>78.07</td>
<td>84.95</td>
<td>6.89</td>
</tr>
<tr>
<td>4</td>
<td>Haora</td>
<td>77.01</td>
<td>83.85</td>
<td>6.84</td>
</tr>
<tr>
<td>5</td>
<td>Hugli</td>
<td>75.11</td>
<td>82.55</td>
<td>7.44</td>
</tr>
<tr>
<td>6</td>
<td>Darjiling</td>
<td>71.79</td>
<td>79.92</td>
<td>8.14</td>
</tr>
<tr>
<td>7</td>
<td>Paschim Medinipur</td>
<td>70.41</td>
<td>79.04</td>
<td>8.63</td>
</tr>
<tr>
<td>8</td>
<td>South Twenty Four Parganas</td>
<td>69.45</td>
<td>78.57</td>
<td>9.12</td>
</tr>
<tr>
<td>9</td>
<td>Barddhaman</td>
<td>70.18</td>
<td>77.15</td>
<td>6.97</td>
</tr>
<tr>
<td>10</td>
<td>Nadia</td>
<td>66.14</td>
<td>75.58</td>
<td>9.45</td>
</tr>
<tr>
<td>11</td>
<td>Koch Bihar</td>
<td>66.30</td>
<td>75.49</td>
<td>9.19</td>
</tr>
<tr>
<td>12</td>
<td>Dakshin Dinajpur</td>
<td>63.59</td>
<td>73.86</td>
<td>10.26</td>
</tr>
<tr>
<td>13</td>
<td>Jalpaiguri</td>
<td>62.85</td>
<td>73.79</td>
<td>10.94</td>
</tr>
<tr>
<td>14</td>
<td>Bankura</td>
<td>63.44</td>
<td>70.95</td>
<td>7.52</td>
</tr>
<tr>
<td>15</td>
<td>Birbhum</td>
<td>61.48</td>
<td>70.90</td>
<td>9.41</td>
</tr>
<tr>
<td>16</td>
<td>Murshidabad</td>
<td>54.35</td>
<td>67.53</td>
<td>13.18</td>
</tr>
<tr>
<td>17</td>
<td>Puruliya</td>
<td>55.57</td>
<td>65.38</td>
<td>9.81</td>
</tr>
</tbody>
</table>
As already mentioned, women education among Muslims in the state is much lower than men. The educational status of Muslims in West Bengal, like other parts of the country is also depressing.

### Table-4: District wise Literacy Rate of Muslims in West Bengal 2011

<table>
<thead>
<tr>
<th>District Name</th>
<th>Muslim</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Total</td>
</tr>
<tr>
<td>Darjeeling</td>
<td>50.38</td>
</tr>
<tr>
<td>Jalpaiguri</td>
<td>55.34</td>
</tr>
<tr>
<td>Koch Bihar</td>
<td>56.07</td>
</tr>
<tr>
<td>Uttar Dinajpur</td>
<td>36.04</td>
</tr>
<tr>
<td>Dakshin Dinajpur</td>
<td>67.21</td>
</tr>
<tr>
<td>Malda</td>
<td>45.30</td>
</tr>
<tr>
<td>Murshidabad</td>
<td>48.63</td>
</tr>
<tr>
<td>Birbhum</td>
<td>59.86</td>
</tr>
<tr>
<td>Barddhaman</td>
<td>68.79</td>
</tr>
<tr>
<td>Nadia</td>
<td>49.41</td>
</tr>
</tbody>
</table>
Table-4 shows the Muslim female literacy rate (49.75%) in West Bengal. Also, Muslim female literacy rate is much less than the Muslim male literacy rate of 64.61%.

Table-5 shows that the average literacy rate of Muslim women in the State is 49.75 where as in urban areas it is 59.23% and in the rural areas it is 47.87%. Thus it seems there is significant rural urban gap in the literacy rate.
Rahaman and Bhuimali (2011: 84 and 91) mentioned “among various reasons, the major reasons for educational backwardness among the Muslims are poor economic condition, limited number of government and government aided schools in Muslim areas and lack of job opportunities of the educated people in the community. Perhaps Muslim women are lagging behind in education because of socio-cultural pattern of the families and the society, the hostile attitude towards girls’ education and lack of infrastructural facilities for education in Muslim concentrated areas. Muslims have limited access to the far off schools. Thus the need of the hour is to provide job oriented education and also to set up sufficient number of technical schools for male and female separately in the Muslim concentrated areas”

Table-6 above reveals the inter-religious disparities in literacy level of West Bengal. Literacy condition of the Muslims is worse than that of all other religious communities of the state; they recorded lowest literacy rate among the religious groups as only 57.47 percent of them are literate. Literacy level of Bengali Muslims are not only less than the state’s and national average literacy level but also national Muslim average literacy level, where only 64.61 per cent of males and 49.75 per cent of females are literate, or they are the most illiterate religious community in the state of West Bengal. The highest literacy level is found among Jain 92.81 per cent, while Sikh accounted for 87.73 per cent and Buddhist and Christian with 74.73 per cent and 69.72 per cent of literacy level respectively occupy third and fourth position among the six religious group of the state.

In the reports of the ‘National Education Survey’ it is shown that Muslim Women are seven times behind Hindu women in high school education and in post-high school they are nine times behind them.
Hasan and Menon (2004: 47) state that “the educational backwardness of Muslim women is a matter of particular concern, especially the high drop-out rate, resulting in subsequently fewer proportions of them managing to complete high school”. There is also a common belief that Muslim parents feel that education is not important for girls and that it may instill a wrong set of moral and cultural values. Even if girls are enrolled, they are withdrawn at an early age to marry them off. This leads to a higher drop-out rate among Muslim girls in West Bengal.

**Socio-Economic Condition of Muslim Women in West Bengal**

Empowerment of women implies their better position in socio-political and economic spheres. Empowerment of Muslim women is crucial as they continue to be victimized by traditional social structure, social systems and social institutions of their community. Educational backwardness of majority of the Muslim women is one of the crucial factors for their lagging behind in employment, while economic empowerment is also essential for raising their status in social hierarchy and social change. Therefore, lack of education, economic dependency, poverty and ignorance of their rights have made them further vulnerable to exploitation.

![Figure-1: Sex-wise Work Participant Rate in West Bengal among various Religious Communities (percentages)](source)

It is observed from Figure-1 that the Work Participant Rate (WPR) of Muslim women in Bengal in comparison to the other communities is very poor. Here Work Participation Rate (WPR) in case of Hindus, Christians and Buddhists are 19.2%, 29.2% and 25.8% respectively. But the Work Participation Rate of Muslim Women is only 14% in West Bengal that depicts a gloomy picture.
A large number of Muslim women in rural Bengal are predominantly engaged as agricultural labourer. A substantial number also specializes in handicrafts like needle works, zari works, tailoring, embroidery and paper crafts. Muslim women from poverty stricken suburban and other remote areas of Bengal are found to arrive in Kolkata and other towns every morning largely by local trains in search of daily workers job. Muslims are mostly self-employed and their share in regular paid jobs is low. The Hindu population is relatively better employed in regular salary-paying jobs in urban areas. “The work participation rate of Muslim women is extremely low. The landholding is better among Hindus than Muslims in rural part of India. Muslims, are, by far, the least educated when compared with Hindus and Christian populations in India” (Shariff, 2003: 92).
<table>
<thead>
<tr>
<th>Sl. No.</th>
<th>Districts</th>
<th>Cultivators</th>
<th>Agricultural Labours</th>
<th>Household Industry</th>
<th>Other Works</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Kolkata</td>
<td>1.76</td>
<td>0.67</td>
<td>13.04</td>
<td>84.53</td>
</tr>
<tr>
<td>2.</td>
<td>Burdawan</td>
<td>11.39</td>
<td>16.83</td>
<td>27.53</td>
<td>44.25</td>
</tr>
<tr>
<td>3.</td>
<td>Nadia</td>
<td>18.91</td>
<td>7.95</td>
<td>24.57</td>
<td>48.57</td>
</tr>
<tr>
<td>4.</td>
<td>North 24 Parganas</td>
<td>7.50</td>
<td>15.30</td>
<td>23.28</td>
<td>53.92</td>
</tr>
<tr>
<td>5.</td>
<td>Howrah</td>
<td>2.50</td>
<td>5.24</td>
<td>52.01</td>
<td>40.25</td>
</tr>
<tr>
<td>6.</td>
<td>Hooghly</td>
<td>12.83</td>
<td>14.48</td>
<td>29.30</td>
<td>43.39</td>
</tr>
<tr>
<td>7.</td>
<td>South 24 Parganas</td>
<td>10.27</td>
<td>29.51</td>
<td>21.22</td>
<td>39.00</td>
</tr>
<tr>
<td>8.</td>
<td>Birbhum</td>
<td>9.76</td>
<td>12.90</td>
<td>46.25</td>
<td>31.10</td>
</tr>
<tr>
<td>9.</td>
<td>South Dinajpur</td>
<td>23.05</td>
<td>31.41</td>
<td>6.66</td>
<td>38.89</td>
</tr>
<tr>
<td>10.</td>
<td>Darjeeling</td>
<td>7.25</td>
<td>28.49</td>
<td>2.75</td>
<td>61.51</td>
</tr>
<tr>
<td>11.</td>
<td>Medinipur (East and West)</td>
<td>12.65</td>
<td>27.19</td>
<td>31.12</td>
<td>29.04</td>
</tr>
<tr>
<td>12.</td>
<td>Murshidabad</td>
<td>3.61</td>
<td>4.14</td>
<td>74.13</td>
<td>18.11</td>
</tr>
<tr>
<td>13.</td>
<td>Coochbihar</td>
<td>30.77</td>
<td>53.32</td>
<td>3.29</td>
<td>12.61</td>
</tr>
<tr>
<td>15.</td>
<td>North Dinajpur</td>
<td>25.47</td>
<td>45.33</td>
<td>11.81</td>
<td>17.40</td>
</tr>
<tr>
<td>16.</td>
<td>Bankura</td>
<td>17.58</td>
<td>19.52</td>
<td>39.40</td>
<td>23.50</td>
</tr>
<tr>
<td>17.</td>
<td>Purulia</td>
<td>20.07</td>
<td>55.50</td>
<td>12.46</td>
<td>11.97</td>
</tr>
<tr>
<td>18.</td>
<td>Malda</td>
<td>4.88</td>
<td>14.16</td>
<td>74.13</td>
<td>18.11</td>
</tr>
</tbody>
</table>

All over West Bengal 11.01 19.21 38.95 30.84

Source: Govt. of India, Census Report, 2011
Table-7 shows that Muslim women have the lowest work participation rate (WPR) among all three categories of work in West Bengal.

Some Employment pictures of Muslims in West Bengal

A Recent report titled "Living Reality of Muslims in West Bengal" published by Pratichi Trust in association with SNAP and Guidance Guild reveals that (a) around 80% of rural Muslim households in Bengal earn Rs.5000/- or less a month (b) 38.3% Muslim households in rural Bengal earn Rs.2500/- or less per month (c) 1.55% households’ main earner is a school teacher (d) Public sector accounts for the income of only 1.54% Muslim households (e) Private sector accounts for income of only 1% of Muslim households. These are the few gloomy features of the economic condition of Muslims in West Bengal.

According to Bureau of Economics and Statistics, Staff Census Report, 2014-15, Govt. of West Bengal shows that in the Govt. services only 5.47% are Muslim employees out of total 3.5 lakh employees in West Bengal.

Table 8: Employees of Muslim Community in the Govt. Services in West Bengal between 2007 and 2015

<table>
<thead>
<tr>
<th>Government Service</th>
<th>Year (2007-2015)</th>
<th>Percent (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Other than K.P and K.C</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2007</td>
<td>2.1</td>
<td></td>
</tr>
<tr>
<td>2015</td>
<td>5.47</td>
<td></td>
</tr>
<tr>
<td>Kolkata Police (K.P.)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2007</td>
<td>9.13</td>
<td></td>
</tr>
<tr>
<td>2015</td>
<td>9.44</td>
<td></td>
</tr>
<tr>
<td>Kolkata Corporation (K.C.)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2007</td>
<td>4.87</td>
<td></td>
</tr>
<tr>
<td>2015</td>
<td>4.79</td>
<td></td>
</tr>
</tbody>
</table>

Source: Staff Census Report, 2014-15, Govt. of West Bengal

Few years back in 2008, an RTI query filed by a Kolkata-based citizen named ‘Sabeer Ahamed’, shows the representation of Muslim employees in two major Government departments to be abysmally low. It does not even have a representation of 10% of the workforce in the Kolkata Police (KP) and Kolkata Municipal Corporation (KMC). According to the information revealed by the Kolkata Police, the total number of employees in the force is 24840 of which only 2267 are Muslims, constituting a merely 9.13%
of the overall strength (Table-8). Out of total employees in the Kolkata Police, only 414 are women, where 12 of them (2.9%) are Muslims. The figures from the KMC paint an even grimmer picture. The municipal body has only 1,555 Muslim employees in its workforce of 34,731. Of them 4556 women employees it has, only 136 are Muslims, comprising just 2.98%.

**Islam and Status of Muslim Women in Bengal**

The common perception is that religious conservatism among Muslim women in not accessing education is incorrect. In Islam, both men and women are encouraged to acquire education. The social and cultural life of the Muslims, living in various parts of the country, display distinctive features, as they are influenced by both Islamic as well as regional and local traditions. Muslims are the members of Islamic community (*Umma*) out of common belief and faith. Bengal has a significant Muslim population. Bengali Muslims adhere to the basic principles of Islam and at the same time they share the local traditions of Bengal. Bengali Muslims share the traditions of Bengali culture, which is common to both Hindus and Muslims of this region. It is a historical fact that most of Bengali Muslims were converted from Hinduism.

But it is a stigma of our society that a lot of Muslim women are still living in malnutrition, illiteracy, superstition and under Mollah's (fundamentalist) ignorant ruling. Sometimes they believe that Mollahs can cure almost all diseases by ism (verse of religion). Somehow, they also believe that Mollahs can understand and provide answers to all the problems from railway engine to every scientific, economic problem as described in our holy book. A large number of poor Muslim men and women in Bengal have not seen a doctor in their life time. So they depend on the quack. Earlier, fundamentalism (Mollah Raj) had declared that woman leadership/empowerment is prohibited in Muslim religion. Though, the increasing literacy rate among Muslim women show that the Mollah beliefs are gradually losing ground and it is a silver lining of the Muslim community. In fact, Islam took a positive view and came forward to safeguard whatever was essential for uplifment of women in Muslim society. Islamic Law also highlighted the preservation, protection and promotion of the rights of women in Muslim society.

**A Case Study of North 24-Parganas District**

North 24 Paraganas district is a district in southern part of West Bengal. It is bordered with Nadia district on the north and south with Kolkata. “Barasat” is the district headquarters of North 24 Paraganas.

The Deganga Community Development Block is an administrative division in Barasat Sadar subdivision of North 24 Parganas district of West Bengal. Headquarter of this block is located at “Debalaya”. Villages ‘Matikumra’, ‘Rajkuber’ and ‘Simulia’ where we have conducted our studies are located under the “Chowrasia” Gram Panchayat of Deganga Block.
State: West Bengal

- District: North 24 Parganas
- Subdivision: Barasat Sadar
- Block: Deganga
- Panchayet: Chowrashi

Villages:
1. Matikumra
2. Rajukber
3. Simulia

<table>
<thead>
<tr>
<th>Village</th>
<th>Illiterate (%)</th>
<th>Educated Women</th>
<th>Literate (%)</th>
<th>Total (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Primary (%)</td>
<td>Middle (%)</td>
<td>H.S. Exam. (%)</td>
<td>Graduate (%)</td>
</tr>
<tr>
<td>Matikumra</td>
<td>63.33</td>
<td>15.33</td>
<td>11.33</td>
<td>6.33</td>
</tr>
<tr>
<td>Rajkuber</td>
<td>58.21</td>
<td>16.13</td>
<td>13.23</td>
<td>7.33</td>
</tr>
<tr>
<td>Simulia</td>
<td>50.02</td>
<td>18.17</td>
<td>14.04</td>
<td>10.22</td>
</tr>
</tbody>
</table>

Source: Field Survey
At random, 50 households were chosen for sample survey from all the three selected villages and the empirical results are shown in Table-9. The village survey shows a poor literacy level among Muslim women. The literacy rate of women in the village of “Matikumra” is only 36.67%, in “Rajkuber” 41.79% and in “Simulia” village it is 49.98%. Among the villages, the literacy rate of Muslim women of village “Simulia” is better than the other two villages.

**Level of Education of Women**

It is illustrated from table-9 that in “Matikumra” village, 15.33% women are educated up to Primary level, 11.33% up to Middle school, 6.33% are up to H.S. level, 2.33% are educated up to Graduate level and 1.35% are educated up to Post Graduate level out of the total literate of 36.67%.

In “Rajkuber”, 16.13% women are educated up to Primary level, 13.23% up to Middle school, 7.33% are up to H.S. level, 3.54% are Graduate and remaining 1.56% has completed Post Graduate level out of the total literate of 41.79%. In “Simulia”, 18.17% of the women are educated up to Primary level, 14.04% up to Middle school, 10.22% are up to H.S. level, 5.51% are Graduate and remaining 2.04% have completed Post Graduation out of the total literate of 49.98%.

It is also revealed from the above tables that the literacy rate of Muslim women of “Matikumra” and “Rajkuber” are lower as compared to “Simulia” village. The information shows that Simulia village is pretty advanced in education, which is assumed to be due to the availability of local schools and college that exerts a great influence on the education rate.

Education is the chief indicator of “Human Development index”. This is the guiding force in every sphere of life. Accessibility to education determines the development and emancipation of a society. Knowledge gives one power which leads to empowerment. Although recently the Muslim women have made a little progress in their education level, still it is very little compared to the general scenario.

**Types of Employment**

So far the working condition of Muslim women is of concern in these villages. We found that an average of 60 percent are engaged as house keeping works and remaining segment are involved in different economic activities.

There are three types of works in which Muslim women are engaged in these surveyed areas – non paid work (in their own fields), paid work (agrarian labour) and government jobs (including self-help
group and others), The agrarian work consists of planting paddy and jute saplings and to untie tissues of jute from stems.

<table>
<thead>
<tr>
<th>Village</th>
<th>House Keeping (%)</th>
<th>Types of Employment</th>
<th>Total (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Agricultural Land (own Land) (%)</td>
<td>Labourer (including Agrl. labourer and others) (%)</td>
<td>Others (Govt. Job, Self Helf Group and Others) (%)</td>
</tr>
<tr>
<td>Matikumra</td>
<td>65.33</td>
<td>15.63</td>
<td>11.86</td>
</tr>
<tr>
<td>Rajkuber</td>
<td>62.21</td>
<td>17.13</td>
<td>11.23</td>
</tr>
<tr>
<td>Simulia</td>
<td>55.02</td>
<td>18.17</td>
<td>10.04</td>
</tr>
</tbody>
</table>

Source: Field Survey

In “Matikumra” village, out of total household surveyed, 65.33 percent women are housewife and maintain house keeping works. Remaining 34.67 percent women are engaged in some kind of other earning work. Out of 34.67 percent, 15.63 per cent are engaged in their own or leasehold agricultural land, 11.86 percent are engaged in agricultural or others types of labourer work and 7.18 percent are engaged in other working sectors like Self Help Group, garment tailoring and few are in Govt. jobs (Table 10).

In “Rajkuber” village, 62.21 percent women are engaged house keeping works and remaining 37.79 percent women are engaged in other working sectors. Out of 37.79 percent, 17.13 per cent are engaged in their own or leasehold agricultural land, 11.23 percent are engaged in agricultural or others types of labourer works and 9.43 per cent are engaged in other working sectors like Self Help Group, garment tailoring and few are in Govt. jobs.

In “Simulia”, 55.02 percent was housewife and are engaged in house keeping works. 44.98 percent are working women. Out of 44.98 percent working women, 18.17 per cent are working in their own or leasehold agricultural land, 10.04 per cent are engaged in agricultural or others types of labourer works and 16.77 per cent are engaged in other working sectors like Self Help Group, garment tailoring, nursing, petty business and some are in Govt. jobs.

It is found on the above analysis that majority Muslim women of three villages are engaged in their household work as house wives. Second majority are engaged in their own agricultural field. The remaining are engaged in other working sectors like Self Help Group, garment tailoring, nursing, petty business and in Govt. jobs.
Here it is an interesting feature that the women of “Simulia” village where 16.77 percent are engaged in Self Help Group, garment tailoring, nursing, petty business or in Govt. jobs in contrast to other two villages like “Matikumra” and “Rajkuber” (7.18% and 9.43%). It is presumed that ‘Simulia’ village being well connected with Barasat Sadar and Berachampa town and with several schools and one college established in this area, so the education level amongst Muslim women is high in this village. During survey questionnaire, it was found that the Muslim women felt the need of some handcraft industry in their villages which would provide them the opportunity of earning.

An ILO study finds that men tend to spend 60 % of their income in their home and 40 per cent on themselves, whereas women spends 90 % of her income on her family and only 10 per cent on herself. Thus, when a woman controls the household’s income the family gets more benefits (Kumar 1995)\(^{11}\).

Table- 11: Household Size in Muslim families

<table>
<thead>
<tr>
<th>Village</th>
<th>Family Size (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>≤4</td>
</tr>
<tr>
<td>Matikumra</td>
<td>10.33</td>
</tr>
<tr>
<td>Rajkuber</td>
<td>13.83</td>
</tr>
<tr>
<td>Simulia</td>
<td>18.67</td>
</tr>
</tbody>
</table>

Source : Field Survey

Table-11 depicts the household size of Muslim families of three surveyed villages. It is found from the table that in “Matikumara” village the household size of Muslim families ≤4 is 10.33%, 4-6 is 45.11%, 7-8 is 25.26% and ≥8 is 19.3% respectively. In “Rajkuber” village it is ≤4 is 13.83%, 4-6 is 43.6%, 7-8 is 24.73% and ≥8 is 17.8% and in “Simulia” village it shows ≤4 is 18.67%, 4-6 is 42.63%, 7-8 is 23.34% and ≥8 is 15.36% respectively.

It is also found from the table that the highest ≥8 family size is found in “Matikumra” village (19.3%) and lowest in “Simulia” village (15.36%). It may be understood that the highest and lowest birth rate depends on level of education. We indicated in the earlier chapter that the education level amongst Muslim women is high in “Simulia” village. So it can be presumed that the low birth rate in ‘Simulia’ village as compared to the other two villages is due to higher number of educated Muslim women.
Decision Making and Mobility of Women

Education of women and empowerment are essential not only for economic development but also has a transformative effect on the goals of both economic and social development. Education strengthens the power of decision making. Income takes it one step ahead. But due to low literacy rate and in male dominated families, Muslim women are not in the position to take free decision in family and social matters. Women accept the decisions made by male. In Simulia village, where the literacy rate is high among the Muslim women, they feel the freedom of decision making more than the women of other two villages. About 70% respondents of “Simulia” village revealed that they participate in family welfare related decision making. However, Muslim women are still more vulnerable about their equal rights in the families. If someone revolts, the consequence is the physical torture on them. Woman after spending 10-15 years of marital life achieve certain power in expressing her views. Women usually don’t go to market for daily shopping. They usually travel with their guardians or husband. Few girls who daily go to college travel alone. Except for a few, marriage does not bring them any radical freedom. Most of the job holders got jobs after their marriage. Of them a few can go alone where ever they desire to go, but most prefer their husband’s company.

Education of Girls

Educations of women help in the development of the individual member and hence assist the development of the whole family. During questionnaire session the respondent’s view were positive towards their daughter’s education. About 75% respondents gave their opinion for equal right to the education of son and daughter and 20% agreed that daughter’s education was less than son. They argued that if the girls receive higher education then it would be very difficult to get them married. Instead they preferred the girl to remain within four walls of the house and do the domestic work with low education. Only 5 percent of the respondents agreed for daughter’s education more than son because the respondent’s married in well-educated and cultured family and they feel if the daughter is educated then she can handle her family easily. These respondents are mostly seen in the Simulia village, where educational level is higher than the other two villages.

Condition of Health

The health condition of Muslim women in the three villages shows high ratio of disease, malnutrition and ill health. Generally health care is almost ignored due to inadequate nutrition, poor health, lack of
Political Awareness

Here again education plays a vital role for self-awareness and self-confidence about the power of decision making. During the questionnaire session with the women of three villages it was observed that most of them don’t have any knowledge about the political parties and their ideologies. Though, in any election they show much enthusiasm in matters of casting vote. In casting vote they feel empowered but to whom they should vote is not decided by them. The family decision (the decision of male) is considered to be the final one. Some women however desire to contest elections (especially in panchayats) as candidates. This prospect is present in “Simulia” village, where education level amongst Muslim women is high but in much subdued form. Some accepts their family decision as final. Although, a lot of women told that they feel independent in this matter. But the tragedy is that they could not realize their power as a potential group that may change the political history of society.

Conclusion

The impoverished status of a large number of Muslim women in West Bengal underlines the urgency for further inquiry in this area and also the need for active intervention by state agencies to implement policies to redress this imbalance and ensure Muslim women's full and equal participation as Indian citizens. So that we can revise many rules for people’s needs and now time has come that we shall have to think what steps should be taken to improve their status. Some of these steps are as follows:

(a) Polygamy should be abolished.

(b) Education of girls can be made compulsory and they may be permitted to work outside.

(c) Adoption of equal rule of property distribution for all sections of Muslim.

An educated woman means an educated family and healthy children. Education is needed to secure a job; a working girl means a solvent family and ultimately educated and solvent State. To clean superstition is difficult but many things can be changed through education. We have to do this in order to empower the Muslim women in Bengal.
At last an impressive report 2010-11 made by National University of Education Planning and Administrative (NUEPA) under Ministry of Human Resources Development on West Bengal Muslim education stated that in the years of 2007-08, 2008-09 and 2009-10, respectively 28.13%, 28.28% and 32.30% of every 100 primary school children in West Bengal were Muslims, while 25.25% of the State’s population is Muslim. West Bengal's figures for Muslim students’ enrolment at the primary level are better than the national average of 10.49% in year 2007-08, 11.03% in 2008-09 and 13.48% in 2009-10 respectively, while Muslims form 13.43% of India’s population. West Bengal’s record is far better than that of Gujarat. There, Muslim students’ enrolment at the primary level was 4.57% in the year of 2007-08, 4.73% in 2008-09 and 6.45% in 2009-10. Among all States and Union Territories, West Bengal ranks 6th in primary school level enrolment among Muslim students.

Suggestions

Over the last two decades, the position of Muslim women in the society has come to the notice of the academicians, policy makers and development authorities of India. It has been considered that the Muslim women are the most deprived segment of the country’s population. Muslim women play a crucial role in well being and very survival of the Muslim families. But unfortunately for various reasons the gender disparity is very much conspicuous in Muslim society. The marginalized status of Muslim women is not well documented. Therefore, information on Muslim women, particularly on their social position, problems and prospects is very much needed for the sake of their empowerment, which is one of the priority areas of our national development.

For the overall socio-economic development, women particularly Muslim women should be allowed to pursue their own path in respect of education and employment and should be allowed to participate, particularly in decision making.

Observations

1. Muslim women should be given a required level of skill, education and training not only for their employment, but as necessary requirement for their independence, freedom and to become a fully developed social and cultural being.

2. Women should be paid equal wages for equal work.

3. Skill education should be given to Muslim women in rural areas of West Bengal.

4. Muslim women should be allowed to participate in political, social and economic activities at all level.
5. There is a need for adopting an alternative approach to women’s education particularly for Muslim women in the lower socio-economic strata in rural areas.

6. Education is one of the main factors for empowerment and upliftment of Muslim women in the society. We have observed it from our empirical study in the villages where education level of Muslim women is high, the Muslim women are getting a better social status, employment scope and others social related facilities than other sections as is evident in ‘Simulia’ village. So education facilities should be given to the Muslim community and women in particular on the priority basis and Govt. and other agencies should come forward to provide these opportunities to the Muslim women in West Bengal.

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Religious Pluralism among Muslims: The Case of Hussain Dighi of West Bengal, India

Hasibul Rahaman

Abstract: Religious Syncretism is a capsulated term, in which it has been observed blending traits of cultural beliefs and practices. The Hussain Dighi (pond) is located at Daspara Gram Panchayat under Uttar Dinajpur District of West Bengal, India. It has perceived by the locals that Hussain Dighi is considered as sacred. The Dighi is covered by the villages and faith by Islam. Since time immemorial, the oral history claimed that the villagers have converted into Nasya Sekh Muslims from Hindu Rajbansis by the hand of sacred man called Hussain. As it is view of the local people, they are decedents of tenth generation of Nasya Sekh Muslims. There are number of rituals and practices have been found in their activities centering on the sacred Dighi and have very much linked with local Ribansi culture by and large. As a result it is undoubtedly says that Hussain Dighi has measured as productive center of religious syncretism, in which it is the main backbone the paper and has consulted with secondary as well as primary data.

Keywords: Hussan Dighi, religious syncretism, conversion, syncretic beliefs and practices

Introduction

India is characterized by rich diversity. During the arrival of the Aryans, there was an interaction with conflict, cooperation and synthesis of different cultural/religious teams. While Brahminism imposed an exclusionist caste hierarchy on society, other streams like Jainism, Buddhism, Kabir, Nanak and multiple local sects like Jotiba, Khandoba, Tukaram, Chaitanya Mahaprabhu, Tantra, etc. contributed to the synthesizing of local cultures. While kings, zamindars and upper castes exploited, irrespective of their religion, the lower castes intermingled and led to the development of syncretic traditions. The term syncretism is associated with multi concepts but it has actual relevance with religion. It refers to the synthesis of different religious forms. It is a controversial and challenging term which has undergone many historical transformations in meaning.

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Syncretism is an important platform of multi-cultural streams, offers an opportunity to be strong cultural amalgam and multi-confessional harmony. The concept syncretism is covered by the cultural reciprocation (Das: 2003). Syncretism is also connected with the system of economy, diet, kinship and in politics (Levison: 1994). The term syncretism was originally used by Plutarch for ‘fusion of religious cults' which occurred in the Graeco-Roman world, 300BC-200CE. Christianity, from its beginning, combined many religious ideas and rituals (Brandon: 1970). Syncretism is the fusion of different beliefs and practices. These colorful mixed kind beliefs are clearly seen in Christianity, Buddhism on one hand and manifestation of Sufism in Islam is running to strengthen the belief of monotheism on the other. Shaw and Stewart (1994) have viewed syncretism as being the “infiltration” of “incompatible traditions” seems to portray a clear reality of syncretism today.

The focus of this paper is on sociological discourse of religious conversion, practices in the religious shrine of Nasya Sekh Muslims in Bengal taking ‘syncretism’ in perspective. The paper is consulted with secondary as well as primary data that is qualitative in nature.

**Religious Approach to Syncretism:**

The sociological understanding is that religion is a universal phenomenon. Religion is a combination of different beliefs, practices, rituals, spiritualism and symbolic metaphors. Several recognition forms have been found in religious institution but three are commonly identified. First, Confucianism, Taoism, Shintoism, and Buddhism are ethical religions. Second, Christianity, Judaism, Islam and Hinduism are theistic religions. The followers of these religion worship one or many gods. Animism is the third, in which the followers believe that spirit can help or harm people (Thio: 1989). The sociologists open up their nervousness in connection with word religion simply because of its ambiguity. Nadel (1954) passed his view that however we define religion we still find uncertainty. Tylor (1903), comments that religion is a belief in spiritual being. This definition was subjected to challenge.

A critical review of early debate on religion shows that crucial problems centered on beliefs versus practices, religious entities or forces and the spiritual or supernatural realms. Even Durkheim’s religious definition of sacred thing has been challenged, as the term coming from Western perspective are not applicable to non-western countries or societies. Weber has been studied the pre-literate and world religion to understand the relation between beliefs and practices and also their secular marker and his sociology of religion was the nature of human existence. He saw no future of religion but only its progressive rationalization and the decline of mystery, magic and rituals. Now the sociologists and social anthropologists sole task is to explore the religious syncretism which is found in our everyday life in a wide variety of settings.
Caste system is the most fundamental aspect of Indian society. It is a system in which social hierarchy is based on purity and pollution concept. A sect is a religious group and functions to satisfy a society's need. Reformist groups and sects have emerged on issue of equality. The reformist leader belongs to lower caste, Muslims and tribals and they also come from poor economic backgrounds.

In the isolated past intensive religious activity had taken place which were designed to overthrow the predominance of Buddhism and Jainism in India. In this phase we observed the breaking down of the barrier of caste system inherent in the Vedic religion by admitting devotees even from untouchable castes into the order of Bhaktas and thereby evolved Bhakti movement. During the mediaval (13th -17th century) period Hinduism underwent drastic transformation and focused on one god. Ramanuja founded a religious sect. Ramananda (1400-70), follower of Ramanuja settled in Varanasi and established his own sect named Ramanandi. Ramananda was against and opposed the inequality of caste system and opened the door for all and included women out castes and even Muslims. The Ramanandis lined the way for later sects like the Sikhs and Kabirpanthi. Kabir (1440-1518) started out as believer of Ramananda but later developed his own characteristic eclecticism. Kabir viewed that only bhakti people could precede one to god. (Gnanambal, 1970 as found in Das, 2003).

According to Guru Nanak Hindu, Muslim and all religious sects are considered the children of the same god. He was influenced by the school of devotion (Bhakti) of Ramananda, Kabir and having assimilated the philosophy of Sufism and Islam he founded a syncretic form of his new religion, Sikhism.

Different studies have explored that the Pir, Darbesh in different periods played the positive role to bring about the synthesis between Hindu and Muslim culture. The Kashmiri Bhakti literature claims that at the folk level, there evolved various forms of syncretic blends in Islam with local cults, as reflected, for example, in the poetry of Sayyid Sultan of Bengal (16th Century). In his poem named in Nabi Bangsa, he treated major deities of Hindu religion like Rama and Krishna as successive prophets of god, followed in turn by Adam, Abraham, Mosas, Jesus and Mohammed (S.W.S) (Das: 2003).

**Historical Accounts of Conversion of Muslims in West Bengal:**

It is very difficult to go too far into the Muslim history of Bengal. Historical data in this regard are rather scarce. There is no proper documentary evidence as to when Muslims first entered this area. History reveals that the existence of various kingdoms was known to the Muslim world even in the remote past. The Bakthiar Khalji’s invasion and the subsequent invasion of Ilyas Shah and the Mughals caused penetration of Muslim political forces in India in general and Bengal in particular.

Different scholarly writings have suggested that Islamic door was open in the province of Sindh in India during 715 C.E. It has been said that Islam is clearly visible in India in 1020 and 1194. The most authentic
and acceptable historicity in connection with the conversion of Muslims in India in general and in West Bengal in particular was narrated by R.M. Eton (1997) in his *The Rise of Islam and the Bengal Frontier, 1204-1760*. He claimed that four theories were associated with the conversion. The first of these, which he called the Immigration theory, it was not exactly the conversion but the Islamic diffusion of people. It is viewed, as a good number of India’s Muslims has claimed, that they were the decedents of other Muslims, who had migrated from the Iranian plateau or sailed across the Arabian Sea.

The second theory of Islamization is “Religion of the Sword” thesis; it primarily emphasized on the military force for the diffusion of Islam in India and Bengal in particular but it is debated. Some scholars were strongly against it like Peter Hardy (1789) (as found in Eton: 1997) who has observed, those who argued that Indian Muslims were forcibly converted have generally failed to define either *force* or *conversion* leaving one to presume that a society can and will alter its religious identity simply because it has a sword at its neck. Precisely, how this mechanism worked, either in theoretical or in practical terms, has never, however, been satisfactorily explained. Moreover, proponents of this theory seem to have confused conversion to the Islamic religion with the extension of Turko-Iranian rule in North India between 1200 and 1760, a confusion probably originating in too literal a translation of primary Persian accounts narrating the “Islamic” conquest of India. The force theory of Islamization was not fit for all geographical area in Bengal in particular. Dacca was the residence of the Nawab for about a hundred years, but it contains a smaller proportion of Muslims than any of the surrounding districts, except Faridpur. Malda and Murshidabad contain the old capitals, which were the center of Musalmān rule for nearly four and a half centuries, and yet the Muslims form a smaller proportion of the population than they do in the adjacent districts of Dinajpur, Rajshahi, and Nadia.

Religion of Patronage theory is the third theory of Islamization. This is the view that Indians of the pre-modern period converted to Islam in order to receive some non-religious favor from the ruling class—relief from taxes, promotion in the bureaucracy, and so forth. The last, which Eton has termed, Religion of Social Liberation thesis postulates the rigid and discriminatory nature of Hindu caste system against its lower caste order. When Islam arrived with egalitarian approach, which was spread by the Sufis, general masses converted to Islam.

During the late sixteenth century of Mughal period (1574), Muslims conversion was mainly from rural peasants and artisans of Bengal. These Muslim converts were drawn mainly from Rajbansi, Pod, Chandal, Koch, and other indigenous groups that had been only lightly exposed to Brahmanic culture.

In another context, it has been observed by Mukhopadhyay (2003), the lower grade of Koches in northern zone of Bengal had refused their respectful status in the Hindu fold and was attracted to egalitarian approach of Islam and thus they converted to Muslim (Nasya Sekh).
Conversion by Sufi, Fakir and Darbesh:
The fundamental meaning of Islam is Peace. This is a universal and organized religion of mankind which has attracted millions of people all over the world from various strata due to its egalitarian and undiscriminating approach. It primarily stands on five pillars of creed like as Kalma (Pledge), Salat or Namaz (Prayer), Roza (Fasting), giving alms to the poor Zakat (Tax) and pilgrimage to Macca (Haji). The Prophet Muhammed (S.W.S.) had spread this massage. It is believed that in due course of time this gap was filled by the Sahaba (associates of Prophet) and Sufi saints, who followed the prophetic ideals and led a pious life.

In the beginning Sufism developed in Mesopotamia, Arabia, Iran and modern Afghanistan. It was formalized by the end of 8th century (Farugui: 1984). The Sufis aim for a direct relationship with God and thus their basic features incorporate stands from various sources including Hinduism.

In the context of India, another name of Sufis is Fakir and Darbesh. The first Sufi religious order that came to India was that of Chista by the hand of Khawaja Garib Nawaz, during the era of Sultan in 12th century (Saheb: 2003).

Myths Legends and Oral History of Hussain Dighi:
The Hussain Dighi (large pond) is located in Daspara Gram Panchayat of Uttar Dinajpur district of West Bengal, India. According to the record of BLRO (Block Land revenue officer, Chopra Circle) the total area occupied by the Dighi is near about of 25 bigas of land. There is no proper documentary source in relation to the depth or origin of the pond. According to field data, the pond is surrounded by the three villages which are Godugochh, Glantigarh and Tepagoan. The villagers are Muslims by faith. From the Durkheimian perspective, it may be seen as sacred because it is set apart from other ponds and worshiped by the locals.

Our main task was to search for the actual history behind its name. The question was asked to the older generation and we received several answers from different people. The most acceptable answer are explored here.

It is believed by some that Hazrat Imam Hussain and Imam Hassan were the grandson of Prophet Muhammed and both are considered as martyrs for the hoisting of the Islamic flag and tried to carry on their forefather’s tradition. They were hurtfully killed by the Yazid and were not even given to drink the water of Fraetkul (Euphrates) River. The water of Feratkul River has likeness to this pond and hence the locals named it as Hussain Dighi. Another section of older generation thought that the entire area was
under the kingship of Hussain Shah. During his monarchy a pond was dug for the sake of agricultural activity and from this perspective such a name was given to the pond.

Since time immemorial, in connection with the name of Hussain Dighi, another legend is that an unknown beggar (fakir) named Hussain had resided beside the Dighi. As per the views of the locals, he would always keep silent and devoted himself to God (Allah). He did not feel uneasy if anyone wanted to talk to him. Gradually the locals of neighboring villagers were able to make a rapport with this sacred man. The villagers generally rushed to him, when they felt any health problem and the fakir tried his level best to cure them. Hence, this oral history provides another myth behind the name.

History revels that the northern part of Bengal (commonly known as North Bengal) was occupied by the people of Rajbangsis. As generation passed, the people of the pond area were converted to Islam by fakir Hussain. Now, they are tenth generation of converted Muslims and are known as Nasya Sekh. At present a person claims that his family is the direct descendent of Hussain fakir and he has been taking care of this sacred pond. He is also known as fakir to the locals.

**Religious Fair (Mela):**
The neighboring area population of Hussain Dighi is primarily dominated by Nasya Sekh Muslims but from macro perspective, the whole area is surrounded by the diverse religious faiths.

We know that ritual is a pertinent issue of religion and there are a number of rituals that are observed over the pond. In view of field the report a *mela* (fair), is to celebrated around the Dighi on the first of the month of *Baisak* of the Bengali year (Bengali New Year).

However, preparation for this grand fair, that is providing the infrastructural facilities like construction of mela huts which will accommodate the pilgrims etc. is done under the supervision of present fakir and during the mela time he has the sole responsibility to set up a committee as well.

The huge gathering around the Dighi includes people of heterogeneous origin with respect of to caste, class, religion and sex. They usually come to the fakir for mannat (vow) following their own customs like Islam and Hinduism etc.

The observance of death anniversary of fakir Hussain is known as ‘Urs’. This religious occasion is generally followed after the first of Baisak. At night, the mela committee organizes jolsa (religious discussion) in which the local non-muslims like the Rajbanshi and Santal people gladly participate on this holly occasion.
Hussain Dighi: Different Method of Practices

It is already highlighted that the Hussain Dighi area is covered by different religious communities like Muslims and Rajbanshi and was noted that Muslims are converted from Rajbanshis. They are full of social and religious customs and practices similar to the Muslims which are noted during their visit to Hussain dighi. On the other hand the Nasya Sekh continue their worship of Satya Pir as Satya Narayan Deo and Bisahari Bibi as Bisahari Debi. The practice of offering banana with sindur (vermilion), khir (pies), nunia chal (nunina rice), murga (male chicken) etc. are further examples of fusion of Rajbanshi religious traits with Islamic ones and are all acceptable to the fakir of this sacred pond. Actually these are not allowed in Islam theoretically but here we observed these practices due to strong influence of the local Hindu Rajbansi tradition.

Conclusion:

From the above journey, it is to say that Hussain dighi has expressed broader vision of universal brotherhood among the local Nasya Sekh Muslims and Rajbanshis. The number of devotees has increased mainly due to the Dighi’s supernatural power. The high admire for mystic power and veneration of the way of offering banana and murga etc. by the local people particularly Hindu Rajbansi and their rationale by the Muslims illustrate the importance of this sacred pond as a great synthesizing shrine and it is also the symbol of communal harmony.

References:


