

CHAPTER SIXTEEN

NORMATIVE CONSIDERATIONS ON THE DEVELOPMENT PROCESS FROM A LIBERAL PERSPECTIVE: AMARTYA SEN AND CELSO FURTADO

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Introduction

Amartya Sen and Celso Furtado analyze the development process from a liberal perspective, despite their critiques towards *laissez faire* economics. They share similar assumptions about the ends of development: the expansion of individual and collective freedoms and democracy as a form of government. These are some of the most important concepts in political liberalism. Sen (2000) highlights the importance of a multidimensional normative analysis to evaluate the complex issues related to underdevelopment and poverty, and how misleading a living standard analysis based only on the income metrics can be. According to Sen, health and education are other dimensions that must be taken into account in the analysis of the development of nations. Likewise, Furtado suggested a broad analysis of the development of nations as a historical and global process. Following the ideas of the Economic Commission for Latin America and the Caribbean (ECLAC, better known by its acronym in Spanish and Portuguese, CEPAL), Furtado theoretically explored the difference between rich, developed countries, and poor or backward countries to create an original theory of development. The analysis of the development process is based on the centre-periphery dichotomy of the international economic organization and on *structural* parameters, that is, non-economic variables that have influence on economic variables. Structural parameters (non-economic variables), such as the structure of land ownership and structural unemployment, interact in the long term with the economic variables, and it affects the pace of growth, inequality rates and living standards. The goal of this paper is to offer

methodological insights on the development process from the liberal perspective of Amartya Sen and Celso Furtado.

In the first section I present the concept of development. Sen and Furtado distinguish between means and ends of development and emphasize the priority of the ends, that is, human realization, rather than the means to achieve it, which includes natural resources, commodities and income. In the second section I discuss some of the core ideas of Sen's capabilities approach: multidimensional framework of development, basic and complex functionings, absolute and relative poverty. In the third section, I present Furtado's theory about the development process through three main ideas: (1) the methodological approach to development economics, (2) the consequences of the duality between a centre of developed countries and a periphery of underdeveloped countries in the global economy, and (3) the historical characteristics of this process in Latin America, particularly in Brazil. As a final remark, I present a summary of the points the authors have in common and discuss the limits of each approach. While Furtado provides a historical and political meaning to the economic development process from the structuralist perspective, based on the national state analysis category, Sen's approach goes beyond the nation's borders and brings new analytical categories from a comparative perspective, with no emphasis on the historical and political process.

Means and ends of development

Amartya Sen and Celso Furtado organized their theories on development from a normative perspective. The core of this perspective is trying to define the good of man, as well as the material and political conditions needed to achieve it. Income, wealth and production are seen as *means* to achieve human development. The *ends* of development are the expansion and realization of individual and collective freedoms. Sen and Furtado share a core conception of political liberalism, but both criticize in a very similar way the two main assumptions of liberal economics and its consequences to developmental policies: the traditional view of *homo economicus*, with egoistic rationality, maximizing behaviour and access to complete information; and, the methodological limits of the *ceteris paribus* principle in developmental issues. According to them, these assumptions result in a distorted view of real human motivations and an equally distorted view of the ends of development.

Sen states in *Development as Freedom*:

The ends and means of development require examination and scrutiny for a fuller understanding of the development process; it is simply not adequate to take as our basic objective just the maximization of income or wealth, which is, as Aristotle noted, “merely useful and for the sake of something else.” For the same reason, economic growth cannot sensibly be treated as an end in itself (Sen 1999: 14).

The ends of development, according to Sen’s approach, are about freedom of individuals to choose the life they consider suitable and fair, freedom of thought, personal and community security and the social bases of self-respect. From this perspective on economics based on a normative and multidimensional approach, democracy and active political participation are considered values in themselves, goals to be achieved in the development process. Similarly, from Furtado’s perspective, democracy cannot be left aside for a high economic growth or arbitrary economic adjustments.

The apparent alternative to freedom – accelerated development – can be hazardous to the collective aspiration to freedom, because it could be inferred that the access to freedom by a minority is paid through the sacrifice of the well-being of the vast majority [...] so it is not only about the sacrifice of people but also of values, and it’s not possible to assure that the values destroyed today can be rebuilt tomorrow (Furtado 1962: 162).

Despite their terminological differences, the appropriate informational space to evaluate the development process, a sharp distinction between its means and ends, the emphasis on a broader view of human motivations and aspirations, and the role of democracy as a value in itself are relevant topics to both theories.

Sen argues that a single principle – for example, efficiency maximization – is not enough to deal with normative economic problems. Instead, a plurality of principles should be considered.

Welfare economics is a major branch of “practical reason”. There are no good grounds for expecting that the diverse considerations that are characteristic of practical reason, discussed, among others, by Aristotle, Kant, Smith, Hume, Marx, or Mill, can, in any real sense, be avoided by taking refuge in some simple formula like the utilitarian maximization of utility sums, or a general reliance on optimality, or going by some mechanical criterion of technical efficiency or maximization of the gross national product (Sen 1996: 61).

When several principles are used to evaluate welfare, the informational basis for appropriate normative judgments about the development process gets more comprehensive than the informational basis provided by traditional economics. Broad informational bases of welfare, as well as an evaluation of the development process through combining principles, result in a more realistic set of assumptions about human beings, their real problems and the best public policies to deal with them. In this sense, the view of persons as agents who have diverse valued-goals and commitments on behalf of themselves and society implies that “the [capabilities] approach cannot coherently employ an entirely self-interested model of human motivation” (Alkire and Deneulin 2002: 125). A set of other motivations, perhaps including identity, cooperation, altruism, habit, and sympathy, must also be included (Sen, 1997: 12). Thus the capability approach also has consequences for the model of *homo economicus*, with its limitations to explain the real motivations of human beings. Traditional economics does not focus much on political rights, democracy and quality of life. This perspective has been supported by the military governments of several underdeveloped countries during the twentieth century. In search of economic growth, the governments and elites of countries like Taiwan and Brazil got involved in the *catching up* process, many times consciously neglecting political and civil liberties. These governments may have contributed to the growth of the Gross Domestic Product (GDP), but not necessarily to a social development.

In *Positional Objectivity* (Sen 1983b), Sen also suggests that different social contexts require different informational bases to evaluate development, and each context requires a specific set of principles for a good normative evaluation. Furtado studied the “structural parameters”, which provide the economic and social context usually put aside by the *ceteris paribus* clause of traditional economics. Some of these structural parameters include the consumption standards in underdeveloped countries, political rights, property rights on land and so on. Thus, by studying a broad range of dimensions, a multidimensional framework, both authors provide analytical tools to understand the process of development in a more comprehensive way than usually done by the income theories of development.

The capabilities approach

This section focuses on three topics from the capabilities approach perspective. The first is the distinction between ends and means of

development. The second is the definition of poverty as a deprivation of capabilities and its implications to the study of underdevelopment. The third is Sen's criticism of theories of development focused exclusively on its means, that is, utility, income and resources.

Human beings are the agents, beneficiaries and judges of progress, as well as, directly or indirectly, the primary sources of all production. This dual role of human beings provides a broad range of confusion between ends and means of development. To emphasize production and wealth as the basis of progress is to treat people as the means by which progress can be reached. A country can be very rich in terms of traditional economic indicators, such as GDP, and very poor in terms of quality of life (Human Development Index – HDI). This is what happens in South Africa and Brazil. In order to avoid the confusion between means and ends, Sen identifies the ends of development in terms of how the effectiveness of the means can be systematically confirmed. In this aspect, he sees human life as a set of "beings and doings" called "functionings" that enable people to behave as human beings.

Sen distinguishes elementary functionings, like the avoidance of morbidity and premature mortality, appropriate nourishment, and the ability to make the usual movements, from complex functionings like self-esteem, taking part in the community life and appearing in public without shame. A person is constituted by a set of functionings and an evaluation of anyone's welfare has to include the monitoring of these elements.

Sen illustrates the relation between resources, functionings and capabilities in the well-known example of the bike (Sen 1983b). The bicycle is a resource. However, the availability of the resource is not enough to ride a bike. It is also necessary make the usual movements, to be well nourished, and so on. In other words, the appropriate functionings to be able to ride a bike are as important as the resource. Furthermore, a capability is required, the appropriate skill to ride a bicycle. The agent is able to flourish because he or she is free to use the resources, functionings and capabilities according to his or her will.

Since a person's capabilities are in the core of Sen's normative evaluation of development, he also defines its contrary, poverty. It is primarily the deprivation of functionings and capabilities, not necessarily the lack of resources. According to this view, there is an important difference between relative and absolute poverty that traditional economics does not take into account. On the one hand, the relative poverty measurement helps comparing degrees of deprivation using income indicators. Relative poverty is often measured as the percentage of poor people in an overall population. On the other hand, absolute poverty

represents an absolute form of deprivation and it is not related to deprivation of income, but to values. To exemplify the concept of absolute deprivation, Sen uses Adam Smith's example of the linen shirt. In 17th century England, workers that did not have a linen shirt felt ashamed about it. For this reason, they would not go to certain places, such as restaurants. Not having a linen shirt and feeling ashamed about it are signs of absolute deprivation. In Smith's example, shame is an expression of absolute poverty, and, therefore one of the reasons why these workers avoided some social relations. Sen realizes that absolute deprivation occurs when one pays attention to realizations more than to resources. In the usual measurement of poverty that establishes its thresholds and cut off lines based on income metrics, only a person with no income would be in an absolute deprivation situation. But from Sen's perspective, a poor person is the one who does not realize freedom and cannot flourish. This can happen even if he or she has money and resources (like land), but does not have the appropriate functionings and is not able to turn resources into realizations.

Sen criticizes the traditional theories on economic development because they are based on the informational basis of utilitarianism and on the income metrics. Their perspectives reduce the perception of the real problems of development to a subjective and income matter. The capabilities approach is complementary to traditional income-product or resource-based theories because, from this perspective, human life is seen as a combination of many functionings and capabilities, which are expressions of the realization of human freedom. In this sense, achieving human freedom is a central aspect of economic and social life in which the development process should be framed and evaluated. The rhetoric of "growing the pie before sharing it" was supported in many places where democracy was considered less important than an alleged accelerated growth. But this rhetoric based on the GDP frequently hides a distributive conflict between those who are able to enjoy the present, and the others, who must wait for the outcomes of progress.

According to Sen, the analysis of development must begin with a normative discussion about its goals and its primary variables. Thus, the normative analysis of development should include a perception about the *good of man* in its different dimensions. Even though a single dimension can be an imperfect measure, different dimensions considered together can provide a more complete overall picture of the development process. Sen (2010) recognizes that his approach is consistent with many theories about the expansion of substantive freedom. In Part 3, I suggest that Furtado has a complementary explanation to that of Sen.

Celso Furtado and the persistence of underdevelopment

Furtado's work is an attempt to discover the underdevelopment causes and to offer solutions for reducing poverty and improving quality of life through public planning. He analyzed the underdevelopment process in Latin America during the 1950's and 1960's. Poverty, malnutrition, starvation and all kinds of deprivation reached alarming levels, even taking into account the fact that the Latin American countries are rich in natural resources, with favourable weather conditions and large populations. The explanation of traditional economics, based on the comparative advantage theory, was not compatible with this situation. Countries with a lot of natural resources like Brazil, Bolivia and Mexico should not have the very high levels of poverty they have, with considerable relative backwardness and inequality. Furtado's theory aims to explain the economic and social reasons of such relative delay. He was influenced by Manheim's sociology of knowledge, Weber's comprehensive methodology and Myrdal's circular cumulative causation in his attempts at understanding the persistence of underdevelopment as a historical phenomenon. Against Rostow's theory of stages of growth, he concludes that underdevelopment is an autonomous historical process, and does not necessarily constitute a preliminary stage to a higher level of development. Thus, according to Furtado, there is a stable duality in the world economy organization; it is divided in a core of industrialized nations and a periphery of underdeveloped countries. The industrialized nations supply manufactured products and capital and the underdeveloped nations supply commodities and labour-intensive products to the international markets. The structure of international trade causes a permanent flow of resources from periphery to centre countries, worsening the vicious circle of poverty in the periphery of the international economic system.

In his first works, Furtado referred to the industrialization of periphery countries as the solution to break the vicious circle of poverty. After that, he carried out his research in Cambridge, where he wrote his major work, *Economic Formation of Brazil* (1959), based on the Keynesian economic theory and on historical analyzes to understand the historical movement of Brazilian economic structures. In his late works, Furtado put together economics and cultural analyzes, to understand the role and influence of values in the process of development. Expansion of human freedom and democracy are ends to be pursued in this process and the democratic and humanist values play a fundamental role to achieve social development.

This section is about the main ideas about development as a historical process in Furtado's work. Firstly, I make some methodological remarks about objectivity in economics of development. Then I present the core of Furtado's dualistic and structuralist view of development. Finally, I discuss the relation between values, poverty and underdevelopment from his theoretical perspective.

Furtado (1981) recognizes the methodological limitations of the traditional economics to understand the persistence of underdevelopment. He criticizes the methodology of traditional economics due to its "inability to grasp structural transformations, that is, the interaction of economic with the non-economic variables". As a theoretician, Furtado focuses on the relationship between economic and non-economic variables because the main questions about the persistence of underdevelopment depend on political, economic and historical context.

For the economist, objectivity means understanding that the economic phenomenon cannot be caught outside its context, and in order to place it within this context, value judgments that take into account the acceptance of principles are required [...] In the highly developed nations, which have therefore reached a high level of social integration, a relative agreement on certain basic principles can easily be achieved. The same, however, cannot be said about a rapidly transforming and heterogeneous country, like Brazil (Furtado 1981: 63).

The difference between developed and underdeveloped countries, according to Furtado, is found in social and economic heterogeneity in terms of structures, positional perception and human development. Principles and values constitute the basis of any collective project. In particular, the historical process of development requires a long-term agreement about the basic values to be pursued by a society. This agreement should occur in an open society, in democratic terms.

Although there are few clear references to method in Furtado's work, he presents some considerations about it in Furtado 1983 (*Teoria e Prática do Desenvolvimento, Theory and Practice of Development*, not translated into English). In this work, Furtado defines himself as a member of Latin American structuralism – unlike the French structuralism of Levi Strauss – with strong influences of the sociological method of Max Weber. Furtado captures the methodological similarity between the creation of ideal types used by Weber to explain how society works and the economic models of traditional economics. He emphasizes the variables that are usually not taken into account in the traditional economic evaluation of development and can be explained by Weber's method. Furtado wanted to bring

together the variables included into the *ceteris paribus* clause in his analyses. The objective of this methodological discussion is to expand the informational space (Sen's terminology) used to study the development process.

Furtado created a typology of social and economic variables:

"Type 1" deals with the purely economic phenomena and its significance lies in the economic aspect of society.

"Type 2" refers to economically important phenomena such as religious and social variables.

"Type 3" deals with economically conditioned phenomena, showing relationships between non-economic variables as endogenous, but influenced by economic variables.

According to Fonseca (2009), Furtado acknowledges that his structuralist conception concentrates the study of economics in the "Type 2", while conventional economics concentrates its attention in the "Type 1". Thus, what is constant in a *ceteris paribus* clause is perceived as variable in Furtado's structuralist theory. History, path dependence and social context are considered inseparable from economic diagnoses.

In Furtado's view, the copy of consumption standards of developed countries by local elites is one of the deepest causes of Latin American underdevelopment. The copy of consumption standards promoted by mass media, fashion and entertainment industry and transnational companies changes the structural parameters of periphery economies. That unusual behaviour of demand creates, apart from others consequences, economic dysfunctions in the long-term variables, such as structural unemployment, high inflation rates and deficit in balance of trade. As a consequence of this standard of social behaviour, an anomalous behaviour of the factors of production is verified in Latin American economies, especially due to the high cost of the scarce factor, capital, in relation to the abundant factor, labour. Elite's adoption of foreign cultural standards forms the consumption habits in the long-term economic dynamics. Therefore, values – the cultural standards – have an important role in explaining the relative backwardness of Latin American countries.

Furtado provides a dynamic explanation of the persistence of underdeveloped economies. He points out that underdevelopment is a process that exists concurrently with development. The copy of consumption and cultural standards of developed countries results in a specific operation of technological progress in underdeveloped countries. At first, only the elites of underdeveloped countries have access to consumer goods produced in the developed countries. In this model, the concentration of income is functional to the local elite copy of the

consumption standards of developed countries. The modern methods of production with cutting edge technologies are imported due to their higher productivity. These technologies are at the core of the process of import substitution and they are labour-saving and capital-intensive. The technological progress underuses the abundant factor present in underdeveloped countries, labour, vis-à-vis the scarce factor, capital. Thus, according to Furtado's analysis, Brazil and Latin America were in a situation in which a lot of people could not be consumers because there was a long term structural unemployment caused by the new productive methods. This anomalous behaviour of labour market hindered the endogenous development of the productive forces and increased the social and economic inequality. Furthermore, the highly concentrated nature of income and land ownership meant that available income in underdeveloped countries did not allow the scale increments for the endogenous development of industrial products in competitive markets. Furtado suggested structural reforms in order to deal with the problems generated by the dichotomy of consumption standards and by the underused factors of production seen in peripheral and dependant economies. The reforms were supposed to reduce social inequality and expand the internal markets, with land reform, real increases in wages and public education in rural areas.

Social values rooted as habits and institutions have strong influence in long-term variables such as population growth, technical change and property rights over land. Furtado realized that the consumption standard, which is a cultural matter, has a deep impact on macroeconomic policies. The study of preferences in underdeveloped countries explains much of social inequality: Poor people have adapted their preferences to the scarcity of their living standards; rich people's consumption standards become the consumption standards of developed countries. As Sen, Furtado states that adaptive preferences lie in the core of the study of poverty. People subject to a sharp deprivation for long periods adapt their preferences to the material conditions available. In this sense, utility measurements used by traditional economics do not capture the real state of poverty and underdevelopment problems.

Finally, Furtado was very interested in democracy as a form of government compatible with a country that aims to improve social development. He was one of the few Brazilian scholars who stated that democracy was a suitable form of government during the democratic period that started in 1945 in Brazil and ended with the military coup in 1964. Furtado identified a distributive conflict between the majority deprived from the outcomes of development and the empowered minority

that decides the criteria of allocation of public resources. At that time, Furtado suggested a long-term planning based on rational principles and *base reforms* as an alternative to overcome the distributive conflict in Brazil. He was a scholar, but he also worked as a public planner. He was the superintendent of Sudene in the late 1950's and early 1960's, a federal institution created to encourage economic development in Brazil's northeast. After that he became minister of national planning during João Goulart's government. When the Brazilian military government began in Brazil, Furtado lost his political rights and had to leave Brazil for ten years. As a consequence, his economic and social planning was forgotten and the social conditions got worse.

Final remarks

I have presented Sen's and Furtado's contributions to development studies. From a political point of view, both authors share a similar perspective about the ends of development, as a process of expansion of individual and collective freedom. They believe that democracy is the most suitable political system to achieve this end. In my final remarks, I summarize the ideas they have in common and briefly point out their main theoretical and methodological differences.

The main ideas to be highlighted are: i) historical reality and empirical data (context) are critical to understanding economic phenomena (against general methods from traditional economics); ii) social reality affects and directly influences the economic phenomena (non-economic variables or a broad multidimensional informational basis); iii) the goal of development is to change the structures of underdeveloped societies according to the goals and the values desired by society through democratic functioning of the political system; iv) the ultimate goal of the development process should be the good life for human beings – the expansion and realization of their freedom, which is the core idea of political liberalism.

The capabilities approach has gained popularity among economists, governments and public planners over the last twenty years. The HDI has been used to implement policies against poverty in income, healthcare and educational programmes in underdeveloped countries. However, despite the wide use of this methodology, the capabilities approach does not have an appropriate historical and political explanation for the persistence of systematic deprivation in some countries or territories. The dualistic explanation of international economic organization, the adverse trade conditions to the underdeveloped countries, and the structural analysis

help understand the political questions behind the persistence of low levels of healthcare, education and income systematically captured by HDI maps and reports. As Furtado pointed out, the vicious circle of poverty has structural causes in economic and political asymmetries. For this reason, a more comprehensive analysis of underdevelopment is possible using HDI data with a more solid theoretical basis. Comparisons and ranking lists of countries – the core of Sen’s comparative approach – are not enough to explain *why* some regions, groups or countries are so poor while others are so rich, so a theory is required.

Sen considers the analysis of poverty from the perspective of individual freedom, elucidating some questions that were not clarified in Furtado’s theory. Furtado frequently treats underdevelopment as a territorial issue. Regions and nations are crucial to understand structural changes according to him, but there are other forms of deprivation and poverty that are not perceptible through territorial categories. One of the methodological contributions of capabilities approach’s radical individualism is a break down with the indivisibility of family as basic social unity in the development studies. The approach investigates the distribution of functionings and capabilities in families and provides important statistic data to study intra-family inequalities. This perspective allows creating public policies and designing incentive mechanisms to improve the distribution of resources and opportunities among family members. Some important income programmes – like *Bolsa Familia*, a huge Brazilian income distribution programme for low-income families with children – give money directly to mothers. As a result, it strongly reduces premature mortality and increases the years of formal education for children. This operational change was very effective to help better understand the different dimensions of the underdevelopment phenomena even in a family structure. The theoretical background – the role of women in the distribution of family’s resources and opportunities – was not covered by Furtado’s theory of development and his political concerns to reduce poverty. However, a structural analysis of development can use these data to better understand some important causes of underdevelopment, such as sexism and prejudice against children and elderly people.

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